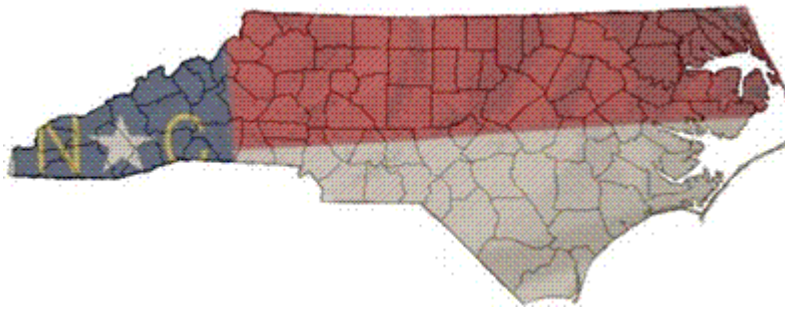


Instructional Guide

Precinct Election Official Certification Program



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*A program of the
North Carolina State Board of Elections
in conjunction with the
North Carolina Community College System*

Introduction

Thank you for participating in the North Carolina Precinct Official Certification Program.

This guidebook is designed to help instructors and precinct election officials gain an in-depth understanding of the elections process. It is the goal of the North Carolina State Board of Elections to have at least one certified precinct official in every polling place in the state. It is our hope that their participation in this program will increase the level of excellence with which our state's officials perform their election duties.

THIS HANDBOOK IS NOT DESIGNED TO PROVIDE YOU WITH LEGAL ADVICE. If a complicated question of law or procedure arises, contact your county board of elections.

Precinct Official Certification Training

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Section 1: History of Voting

This section gives a very brief overview of the history of voting, reasons why people vote, and the laws and regulations that govern voting. The topics will give students a frame of reference for discussing the reasons why they chose to become a precinct official.

Materials

- Handout – History of Voting
- Handout – Top 10 Reasons to Register and Vote
- Handout – Voting Rights Laws

At the conclusion of this section, students will have a basic understanding of:

- The landmark amendments to the Constitution regarding the right to vote
- Various reasons why people register and vote in an election
- Three major voting rights laws



The history of voting in America is a story of ever-increasing voting rights. The rules for eligibility have changed substantially since America's founding, and continue to change today. When America was young, only white males over the age of 21 were allowed to vote. Some of the landmark changes since then:

Black Suffrage

The 13th, 14th, and 15th Amendments to the U.S. Constitution were passed following the Civil War, in the later 1860s. They outlawed slavery and extended civil rights and suffrage (voting rights) to former slaves. The LEGAL right to vote for African-Americans was established, but numerous restrictions kept many blacks from ACTUALLY voting until the 1960s Voting Rights Act.

Direct election of Senators

The 17th Amendment made it so U.S. Senators were directly elected by popular vote. Prior to 1913, Senators were appointed. The President, of course, is still not elected by popular vote, but by the Electoral College. For example, in the presidential election of 2000, Al Gore won the popular vote but George Bush won the Electoral College vote.

Women's Suffrage

The 19th Amendment gave women the right to vote in 1920. This amendment resulted from an international movement of "Suffragettes". Women still lacked the right to vote in Switzerland until the 1970s, and as of 1990 women could not vote in Kuwait.

18-year-old vote

The 26th Amendment lowered the voting age from 21 to 18. This occurred in 1971, amid the Vietnam War, when 18-year-olds were routinely drafted and sent to war without the right to vote.

Reference: http://www.activoteamerica.com/Home2/History_of_Voting/history_of_voting.html

Top 10

Reasons to Register and Vote

1. **It's your money.** The county commissioners, governor, state treasurer, legislators, president and members of Congress you vote for will decide how much of our wealth to invest in public services and how to fairly share the tax burden.
2. **It's your children's education.** You elect local and state school board members who set public education policy and budgets that will affect how well prepared your children and grandchildren will be for the future. Decisions by our legislators, governor, members of Congress and president also affect the public schools-- and the quality and cost of higher education as well.
3. **It's your job.** Congress, the president, the governor and your legislators influence what job training is available, minimum wage, pay equity, fairness in hiring, health insurance through your employer, job and pension security, and workplace safety.
4. **It's your health care.** Action by the governor, legislature and Congress has made health insurance accessible to thousands, but 2 of 10 Americans are still uninsured. Their decisions on Medicaid, Medicare and private insurance laws determine your access to health care.
5. **They're your highways.** America's population and traffic are growing rapidly. Your county commissioners, legislators, governor and members of Congress decide what highways are needed, what alternatives to highways such as public transit to support, and how to pay the bill.
6. **It's your Social Security.** The president and your members of Congress decide how much payroll tax you pay, cost of living increases and benefit schedules for your Social Security pension, and what Medicare services you receive and share payment for.
7. **You breathe the air and drink the water.** Your county, state and national elected officials set pollution standards, enforcement strategies and budgets. They plan and zone where roads and industries will be built and how public lands will be used --decisions that can determine how safe your air and water are.
8. **It's your neighborhood.** Your elected officials and judges make daily decisions about crime prevention, laws and law enforcement, safe and affordable homes, traffic patterns, where to put schools, parks and recreation.
9. **They're our children.** We do our best to keep them healthy, fed, safe, educated and cared for when we are at work or unable to provide. The officials you elect can help or hinder American families trying to do their job.
10. **It's your democracy. Make it work. Register and Vote.**

Reference: League of Women Voters



U.S. Department of Justice Civil Rights Division

Reference: <http://www.usdoj.gov/crt/voting/overview.htm>

Voting Rights Laws

The Voting Rights Act of 1965

The Voting Rights Act is a nationwide prohibition against voting practices and procedures, including redistricting plans and at-large election systems, poll worker hiring, and voter registration procedures that discriminate on the basis of race, color or membership in a language minority group. It prohibits not only election-related practices and procedures that are intended to be racially discriminatory, but also those that are shown to have a racially discriminatory impact. The Voting Rights Act of 1965 was reauthorized and amended in 2006 for the purpose of ensuring that the right of all citizens to vote, including the right to register to vote and cast meaningful votes, is preserved and protected as guaranteed by the Constitution.

Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA)

The Uniformed and Overseas Citizens Absentee Voting Act was enacted by Congress in 1986. The UOCAVA requires that the states and territories allow certain groups of citizens to register and vote absentee in elections for federal offices. In addition, most states and territories have their own laws allowing citizens covered by the UOCAVA to register and vote absentee in state and local elections as well. United States citizens covered by the UOCAVA include:

- members of the United States Uniformed Services and merchant marine;
- their family members; and
- United States citizens residing outside the United States

The National Voter Registration Act (NVRA)

The National Voter Registration Act, also known as the NVRA or the Motor Voter Act, facilitates voter registration for federal elections by allowing voters to register by mail, when they obtain driver's licenses, or when they obtain services from various government agencies, and it permits voter purges only under very controlled conditions. It also helps ensure that eligible voters are not removed from the voting rolls and that people who move in the same registrar's district retain their eligibility to vote even if they have not re-registered at their new location.

The Help America Vote Act of 2002 (HAVA)

The Help America Vote Act of 2002 is designed to improve the administration of elections in the United States by establishing minimum standards for states to follow in several key areas of election administration. It also created a new federal agency to serve as a clearinghouse for election administration information and provided funds to states to improve election administration, including replacing outdated voting systems.

Section 2: Boards of Elections

This section gives an overview of the organizational structure of a Board of Elections at the state, and county level.

Materials

- The Precinct Manual by Robert P. Joyce, Chapter 1

At the conclusion of this section, students will have a general understanding of:

- The organization and duties of the NC State Board of Elections
- The organization and duties of their County Board of Elections.

Section 2: Boards of Elections

State Board of Elections

Responsibilities

- Final responsibility of the conduct of elections in North Carolina belongs to the State Board of Elections. The State board:
 - Trains election officials
 - Issues directives on election procedures
 - Decides election contests
 - Removes local board members

Membership

- The state board has five members, appointed by the governor in May after the gubernatorial election from a list of nominees submitted by the state chairs of the state's two largest political parties.
 - Members serve until the next governor makes appointments four years later.
 - No more than three members may belong to the same political party.
 - People who hold other public offices, party officials, candidates, and campaign managers and treasurers may not serve on the state board.

Organization

- The state board office is in Raleigh
- The chair is chosen among its members
- Daily management is the responsibility of the Executive Director
- The Executive Director is appointed for a 4-year term
- The state board may meet outside of Raleigh
- When investigating election misconduct, the state board must meet in the county where the violation is alleged to have happened

Duties

- Appoints the members of county boards of elections and may remove board members for good reason.
- Adopts rules on matters not adequately covered in the election laws and prescribes the kinds of voting machines, registration forms, poll books, and other materials that local boards of elections may use.
- Maintains the official voter registration list for the state.
- Provides the local board with ballot content and arrangement for statewide elections and instructs the boards on how to prepare local ballots.
- If an election involves more than one county, the respective county boards send the results to the state board, which will certify them.
- Investigates any alleged misconduct.

County Board of Elections

Membership

- Each county has a three-member board of elections.
- Members are appointed by the State Board of Elections and serve a 2-year term.
- Selections are made from a slate of nominations from the state chairs of the political parties.
- Only two of the members can be from the same party.
- People who hold elected office, are party officials other than a convention delegate, are candidates or campaign managers or treasurers, or are related to a candidate may not serve.

Organization

- County board elects one of its members as chair and one as secretary.
- It is required to meet at certain times and meets otherwise as business requires.
- The board employs a director of elections to manage the office.
- In counties with more than 6,500 registered voters, the county board office must be open full-time on all five weekdays.
- In counties with fewer voters the office must be open at least part-time on three days of each week.

Finances

- Almost all funds for the county board of elections come from the board of county commissioners.
- State laws set the minimum amount that must be spent for some activities.

Duties

- Registers voters and conducts elections
- Sets precinct lines, arranges for a polling place in each precinct
- Provides precinct officials with supplies
- Advertises elections
- Examines petitions for elections and for candidates
- Prepares ballots
- Hears appeals from people who have been denied registration by precinct or other registration officials
- Hears challenges to the qualifications of voters who have already registered
- Issues absentee ballots
- Receives local campaign contributions reports
- Determines election results and certifies winners

Registration of Voters

- Precinct officials have virtually no role in voter registration.
- Completed and signed voter registration forms are maintained by county boards.

Reference: [The Precinct Manual](#), Robert P. Joyce, Chapter 1

Section 3: Types of Elections & Frequency

This section gives an overview of types of elections and their frequency.

Materials

- Handout – Types of Elections

At the conclusion of this section, students will have a general understanding of:

- The different types of elections

Types of Elections

Primary Election

A primary election is held to narrow the field of candidates for a general election. In partisan primaries, candidates from each political party who are running for the same office compete to become the party's nominee in the general election. In nonpartisan primaries, the number of candidates running for the same office is narrowed down until there are two candidates for every seat to be filled.

General Election

A general election is held to choose the candidates who will hold elected office at the federal, state and local levels of government, and is usually held the first Tuesday after the first Monday in November in even-numbered years.

Municipal Election

A municipal election is held to fill offices in cities, towns and incorporated villages in odd-numbered years.

Referendum

A referendum is an election held to pass or reject issues of public interest, such as bonds.

Special Election

Special elections are held to levy or repeal taxes, to annex property, to incorporate or establish municipal or special districts, or to permit the sale of alcoholic beverages. Special elections can be called when a governing body adopts a resolution calling for a special election or when a group of citizens petitions for a special election where permitted by law.

Section 3: Types of Elections & Frequency

Time of Regular Elections and Primaries

North Carolina Election Laws
(G.S. 163-1)

Unless otherwise provided by law, elections for the officers listed in the chart below are conducted in all election precincts of the territorial units specified in the column headed "Jurisdiction" on the dates indicated in the column headed "Date of Election." Officers shall serve for the terms specified in the column headed "Term of Office."

Office	Jurisdiction	Date of Election	Term of Office
President/ Vice-President	----	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Governor	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Lieutenant Governor	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Secretary of State	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Auditor	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Treasurer	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Superintendent of Public Instruction	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Attorney General	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Commissioner of Agriculture	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Commissioner of Labor	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
Commissioner of Insurance	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
All other State Officers whose terms last for four years	State	Nov/Tue – 4 Yrs	4 yrs – Jan 1
All other State Officers whose terms are not specified by law	State	Nov/Tue – 2 Yrs	2 yrs – Jan 1
State Senator	Senatorial District	Nov/Tue – 2 Yrs	2 yrs – Jan 1
Members of State House of Representatives	Representative District	Nov/Tue – 2 Yrs	2 yrs – Jan 1
Justices and Judges of the Appellate Division	State	*See Note Below	8 yrs – Jan 1
Judges of the Superior Courts	Superior Court District	*See Note Below	8 yrs – Jan 1
Judges of the District Courts	District Court District	*See Note Below	4 yrs – Jan 1
District Attorney	District Attorney District	*See Note Below	4 yrs – Jan 1
Members of House of Representatives of the Congress of the US	Congressional District ***	Nov/Tue – 2 Yrs	2 yrs
United States Senators	State	*See Note Below	6 yrs
County Commissioners	County	*See Note Below	2 yrs – Dec 1
Clerk of Superior Court	County	*See Note Below	4 yrs – Dec 1
Register of Deeds	Count	*See Note Below	4 yrs – Dec 1
Sheriff	County	*See Note Below	4 yrs – Dec 1
Coroner	County	*See Note Below	4 yrs – Dec 1
County Treasurer (if applicable)	County	Nov/Tue – 2 Yrs	2 yrs – Dec 1
All other county officers to be elected by the people	County	Nov/Tue – 2 Yrs	2 yrs – Dec 1

* At Regular Election of General Assembly – End of Term

** At Regular Election – End of Term

*** Except as modified by G.S. 163-104

Section 4: Running for Office

This section gives an overview of the qualifications and filing requirements to run for a public office. The purpose of this section is to provide students with information to get a frame of reference of the election process.

Materials

- Handout – Notice of Candidacy Judicial Offices
- Handout – Notice of Candidacy U.S. Congress
- Handout – Notice of Candidacy State House and State Senate
- Handout – Notice of Candidacy Governor, Council of State, and District Attorney

At the conclusion of this section, student will have a general understanding of:

- The qualifications to run for public offices

Section 4: Running for Office

Notice of Candidacy

Judicial Offices

1. How do individuals get on the ballot for the primary election? (§163-323, 324, 325, 326)

Candidates must file a notice of candidacy with the SBE and pay a filing fee of 1% of the annual salary of the office sought to the SBE. Notice of candidacy forms may be obtained at the SBE office prior to the date on which candidates may commence filing. Candidates who have properly filed their notice of candidacy and paid the filing fee will have their names certified by the chairman of the State Board of Elections to the Secretary of State three days after the expiration of the filing period. All candidates must, at the time of filing a Notice of Candidacy, file a certificate signed by the chairman or the director of the county board of elections where they are registered to vote, that the person is a registered voter. A candidate may not file for more than one office.

2. When is the filing period? (§163-323[b])

Begins - 12:00 Noon Second Monday in February
Ends - 12:00 Noon Last Business day in February

3. When are the elections? (§163-1)

Primary - The Tuesday after the first Monday in May preceding the general election.
General Election - The Tuesday after the first Monday in November.

4. What are the qualifications for North Carolina's Judicial Offices? (N.C. Const. Art. 6 Sec. 6)

An individual must be at least 21 years of age, a qualified North Carolina voter, and duly authorized to practice law in the courts of North Carolina. Below are the terms for these offices:

Supreme Court Justice (8 years)

Appellate Judge (8 years)

Superior Court Judge (8 years) - at the time of filing, candidate must be a resident of the judicial district (163-323 [g])

District Court Judge (4 years) - must reside in the district for which he/she is elected (N.C. Const. Art. IV Sec. 10)

District Attorney (4 years)

5. How are unaffiliated candidates nominated? (§163-122)

(If the office is a statewide office) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the SBE by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 2% of the registered voters in the State. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(If the office is a district office comprised of two or more counties) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the SBE by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 4% of the registered voters in the district. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

6. How can an individual become a write-in candidate? (§163-123)

(If the office is a statewide office) An individual seeking to become a write-in candidate must file with the SBE a declaration of intent (containing the following: name, residential address, declaration of intent, office sought, date of election, date of declaration, signature) and petition containing the signatures of 500 qualified voters of the State by noon on the 90th day before the general election. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(If the office is a district office comprising all or part of two or more counties) An individual seeking to become a write-in candidate must file with the SBE a declaration of intent (containing the following: name, residential address, declaration of intent, office sought, date of election, date of declaration, signature) and petition containing the signatures of 250 qualified voters of the district by noon on the 90th day before the general election. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

7. What are the Campaign Reporting filing requirements? (§163-278.9)

The Campaign Reporting act requires financial disclosure of all political activities. Various reports are due to be filed at the State Board of Elections Campaign Reporting Office.

Section 4: Running for Office

Notice of Candidacy **US Congress**

1. **How do individuals get on the ballot for the primary election?** (§163-106, 107, 108)
Candidates must file a notice of candidacy with the State Board of Elections and pay a filing fee of 1% of the annual salary of the office sought, to the SBE. Notice of candidacy forms may be obtained at the SBE office prior to the date on which candidates may commence filing. Candidates who have properly filed their notice of candidacy and paid the filing fee will have their names certified by the chairman of the State Board of Elections to the Secretary of State three days after the expiration of the filing period. Candidates must be a registered voter of the same political party in which he or she intends to file (an individual changing party affiliation must do it 90 days prior to the filing date). All candidates must, at the time of filing a notice of candidacy, file a certificate signed by the chairman or the director of the county board of elections in which they are registered to vote, stating the party with which the person is affiliated and that the person has not changed affiliation in the past 90 days. A candidate may not file for more than one office.
2. **When is the filing period?** (§163-106[c])
Begins - 12:00 Noon Second Monday in February
Ends - 12:00 Noon Last Business day in February
3. **When are the elections?** (§163-1)
Primary - The Tuesday after the first Monday in May preceding the general election.
General Election - The Tuesday after the first Monday in November.
4. **What are the qualifications for U.S. Congress?** (N.C. Const. Art. 6 Sec. 6; U.S. Const. Art. 1 Sec. 2 and Sec. 3)
Senate - An individual must be at least 30 years of age, a citizen of the U.S. for 9 years, and a resident of the state for which he/she will be elected. House - An individual must be at least 25 years of age, a citizen of the U.S. for 7 years, and a resident of the state for which he/she will be elected. Individuals running for the House or Senate must be qualified, registered voters in North Carolina. Terms - *Senate* (6 years) - *House* (2 years)
5. **How are unaffiliated candidates nominated?** (§163-122)
(If the office is a statewide office) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the SBE by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 2% of the registered voters in the State. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(If the office is a district office comprised of two or more counties) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the SBE by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 4% of the registered voters in the district. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented. Also, unaffiliated candidates must pay a filing fee of 1% of the annual salary of the office or qualify by petition in lieu of payment of a filing fee.
6. **How can an individual become a write-in candidate?** (§163-123)
(If the office is a statewide office) An individual seeking to become a write-in candidate must file with the SBE a declaration of intent (containing the following: name, residential address, declaration of intent, office sought, date of election, date of declaration, signature) and petition containing the signatures of 500 qualified voters of the State by noon on the 90th day before the general election. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(If the office is a district office comprising all or part of two or more counties) An individual seeking to become a write-in candidate must file with the SBE a declaration of intent (containing the following: name, residential address, declaration of intent, office sought, date of election, date of declaration, signature) and petition containing the signatures of 250 qualified voters of the district by noon on the 90th day before the general election. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.
7. **What are the Campaign Reporting requirements?** (§163-278.30)
Candidate for a federal office, such as the office of United States Senate or member of the United States House of Representatives, need to contact the Federal Election Commission for filing requirements. Toll Free Number 1-800-424-9530. Candidate for federal office are responsible to the Federal Election Campaign Act of 1971, P.L. 92-225, as amended (T.2, U.S.C. Section 439). The State Board of Elections Campaign Reporting Office serves as the State depository for the receipt of copies of reports filed by members of the United States Senate and the United States House of Representatives with the Federal Election Commission in Washington, D.C. This office retains copies of the reports for a two-year period after the election. After that time, they are sent to Cultural Resources, Division of Archives and History, State Records Section where they are then microfilmed.

Section 4: Running for Office

Notice of Candidacy

State House and State Senate

1. **How do individuals get on the ballot for the primary election?** (*§163-106, 107, 108*)
Candidates must file a notice of candidacy with the county board of elections in the county of their residence and pay a filing fee of 1% of the annual salary of the office sought to the county board of elections. Notice of candidacy forms may be obtained at the county board of elections prior to the date on which candidates may commence filing. Candidates must be a registered voter of the same political party in which he or she intends to file (an individual changing party affiliation must do it 90 days prior to the filing date). All candidates must, at the time of filing a Notice of Candidacy, file a certificate signed by the chairman or the director of the county board of elections where they are registered to vote. The certification shall state the party with which the person is affiliated, and that the person has not changed affiliation in the past three months. A candidate may not file for more than one office.
2. **When is the filing period?** (*§163-106[c]*)
Begins - 12:00 Noon Second Monday in February
Ends - 12:00 Noon Last Business day in February
3. **When are the elections?** (*§163-1*)
Primary - The Tuesday after the first Monday in May preceding the general election.
General Election - The Tuesday after the first Monday in November.
4. **What are the qualifications for North Carolina's General Assembly?** (*N.C. Const. Art. 2 Sec. 6, 7; Art. 6 Sec. 6*)
Senate - An individual must be at least 25 years of age, a qualified North Carolina voter, a resident of the State for two years, and a resident of the district for one year preceding the election. House - An individual must be at least 21 years of age, a qualified voter of the State, and a resident of the district for one year preceding the election. Terms - *Senate* (2 years) - *House* (2 years) **Members** of the North Carolina General Assembly - *Senate* (50) - *House* (120)
5. **How are unaffiliated candidates nominated?** (*§163-122*)
(*If the office is a district office comprised of two or more counties*) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the SBE by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 4% of the registered voters in the district. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(*If the office is a single county office*) Any qualified voter who seeks to have his/her name printed on the general election ballot as an unaffiliated candidate shall file a petition with the appropriate county board of elections by 12:00 Noon on the last Friday in June preceding the general election. This petition must be signed by 4% of the registered voters in the county or if the legislative district is less than the entire county, the petition must be signed by residents of the district. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.
6. **How can an individual become a write-in candidate?** (*§163-123*)
(*If the office is a district office comprising all or part of two or more counties*) An individual seeking to become a write-in candidate must file with the SBE a declaration of intent (containing the following: name, residential address, declaration of intent, office sought, date of election, date of declaration, signature) and petition containing the signatures of 250 qualified voters within the district by noon on the 90th day before the general election. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.

(*If the office is a single county office or a legislative district comprised of less than the entire county*) An individual seeking to become a write-in candidate must file, with the appropriate county board of elections by noon on the 90th day before the general election, a petition signed by 100 qualified voters within the district or by 1% of the registered voters if there are less than 5,000 persons eligible to vote for the office. Verification by the chairman of the county board of elections shall be completed within two weeks from the date the petitions are presented.
7. **What are the Campaign Reporting filing requirements?** (*§163-278.9*)
The Campaign Reporting act requires financial disclosure of all political activities. Various reports are due to be filed at the State Board of Elections Campaign Reporting Office.

Section 5: Voter Registration

This section gives an overview of the voter registration process. The purpose of this section is to provide students with information to get a frame of reference of the election process.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 3, 7 and 10
- Handout – Four Ways to Register to Vote
- Handout – Precincts and Districts

At the conclusion of this section, students will have a general understanding of:

- The qualifications to register to vote in North Carolina
- The methods, places, and times to register to vote
- The concepts of districts and precincts
- The process of filing and conducting a challenge to a voter's qualifications.

FOUR WAYS TO REGISTER TO VOTE

1. **IN PERSON, AT A COUNTY BOARD OF ELECTIONS OFFICE**

You can find the address for your county election office on the State Board of Elections' website, www.ncsbe.gov or call (toll free) 866-522-4723. The county staff can help you with the registration form and answer your questions.

2. **IN PERSON, AT MANY GOVERNMENT OFFICES**

You can get a registration form at Driver's License offices, Employment Security Commission offices and most Social Service agencies. The agency will turn in the completed form to the county board of elections. Many libraries and institutions of higher education have forms as well.

3. **IN PERSON, DURING A VOTER REGISTRATION DRIVE**

Many civic groups and political parties set up tables at stores or run registration drives to register people to vote. They typically turn in the form for you; if not, follow the directions on the form to mail it in yourself.

4. **BY MAIL**

You can fill out and mail in your registration form. You can get a form from your county board of elections, or print it from the State Board of Elections' website at www.sboe.state.nc.us. See the website for a listing of county board addresses.

YOU MAY REGISTER TO VOTE IN NORTH CAROLINA IF YOU:

- are a United States citizen
- are 18 years of age or older or will be by the date of the next general election
- are a resident of North Carolina and the county precinct where you want to vote for at least 30 days before the election
- are not a convicted felon still in custody, on probation, or on parole. If you've served all parts of your sentence, you can register. Contact your local board of elections for more details.

NEW RULES ABOUT REGISTERING

You must provide your North Carolina drivers license number if you have one. If not, provide the last four digits of your Social Security Number on the registration form. If you do not have either of these, then you may include with the form a copy of identification that shows your name and address.

Accepted forms of identification include a copy of:

- a current, valid photo ID or
- one of the following that shows the voter's name and address:
 - *current utility bill,*
 - *bank statement,*
 - *paycheck,*
 - *government check,*
 - *or other government document.*

If the board of elections cannot verify the information you provide, you may be asked to show identification when you vote for the first time. Just in case you are asked, it is wise to take along a photo ID or one of the documents listed above when you go to vote, especially if you registered through the mail or during a voter registration drive.

PRECINCTS AND DISTRICTS

Precincts

Counties are divided into precincts for voting purposes. Each voter is assigned to a precinct according to the voter's residence address, and each precinct has a specific location where its residents go to vote.

Electoral Districts

Electoral districts are government subdivisions in which all registered voters residing within the district are entitled to participate in the election of one or more candidates to represent them. School board members, county commissioners, state or federal representatives and district and superior court judges are usually elected by district. Some offices, like Governor, have the entire state as their district.

Section 6: Precinct Officials

This section gives an overview of the qualifications, duties and responsibilities for precinct officials. The purpose of this section is to provide students with information to assess their qualifications and commitment to serve as precinct officials.

Materials

- The Precinct Manual by Robert P. Joyce, Chapter 2
- Handout – Precinct Official Duties and Responsibilities
- Reference – Guide to Precinct Management (Attachment A)

At the conclusion of this section, student will have a general understanding of:

- The qualifications, appointment process, and pay process for precinct officials in North Carolina
- The conduct standards and election law violation for precinct officials
- The duties and responsibilities for precinct officials
- The requirements for training
- The concepts of good precinct management

Precinct Officials

The term "precinct official" shall mean chief judges and judges appointed pursuant to this section, and all assistants appointed pursuant to *G.S. §163-42*, unless the context of a statute clearly indicates a more restrictive meaning *G.S. §163-41*. Under Chapter 10B of 8 NCAC, unless otherwise noted, the term "precinct officials" shall mean chief judge, precinct judge, assistants, emergency election-day assistants, and ballot counters. *8 NCAC 10B.0101*

Three judges are assigned to each precinct: one chief judge and two judges. A typical polling place will have two judges from the same political party as the Governor, and one judge from the other major political party. Judges usually live in the precinct in which they serve. Occasionally, a judge will serve in a precinct outside his/her precinct of residence if a judge cannot be found from within the precinct. Large precincts may have assistants assigned as well. Election officials serving outside their home precinct may vote by absentee ballot before Election Day.

Chief Judge

Each precinct is assigned one chief judge. The chief judge picks up ballots and supplies from the county board of elections (CBE) and acts as a liaison between the CBE, judges and assistants. The chief judge assigns duties to the other judges and to assistants serving in the polling place. Chief judges attend training conducted by the CBE.

Judges

Each precinct is assigned two judges, one from each major political party. As a safeguard against fraud, both judges usually verify voters' registration at the registration station within the polling place.

Assistants

Larger precincts or precincts expecting heavy turnout are sometimes assigned an election assistant(s). In North Carolina, certain high school seniors who are not yet of voting age can serve as election assistants. Assistants serve in many capacities, including the registration station, the help station, the ballot station, the demonstration station, and/or monitor the curbside voting area. Student assistants and regular assistants receive the same training and pay and have equal authority.

Important Notes

Instructional Meetings

The Board of Elections and the Director of Elections are required to instruct election judges before each primary and general election. The chief judge and judges are required to attend this meeting. Election assistants are strongly encouraged to attend as well. Chief judges, judges and assistants will be paid for attending instructional meetings. The Board of Elections will notify you in advance of training sessions for each upcoming primary and general election being held.

Duties & Responsibilities: Chief Judges

Term.....Two-year appointment; August to August of odd-numbered years

Commitment.....Primary, general and special elections from 6:00 a.m. until all election supplies are returned to the elections office

Training.....Attend instructional meetings before each primary and general election

Duties

Once Appointed

- ✓ Take Oath of Office
- ✓ Meet with Director or other staff member of CBE to go over duties and responsibilities
- ✓ Attend mandatory instructional meetings and training workshops according to G.S. 163-82.24 and 8 NCAC 4.0305. Learn how to set up the polling place, use voting equipment, conduct regular and provisional voting, enforce electioneering laws (G.S. 163-166.4), assist disabled voters (8 NCAC 10B.0107 [d]), conduct curbside voting (G.S. 163-166.9 and 8 NCAC 10B.0108), accept voter name/address/party changes, conduct a hearing at the polls, open and close the polls (8 NCAC 10B.0102, -.0105), send election results to the CBE, account for ballots/equipment/supplies (8 NCAC 10B.0106), enforce security and emergency procedures.
- ✓ Inform the CBE if you are the spouse, child, spouse of a child, sister or brother of another precinct official in the same precinct. Serving in the same precinct as a near relative is prohibited by G.S. 163-41.1

Before the Election

- ✓ Attend all instructional meeting(s) prescribed by law and training workshops necessary in carrying out all duties and responsibilities for conducting an election (G.S. 163-46, 8 NCAC 10B.0101)
- ✓ Assist CBE as liaison with judges and assistants
- ✓ Schedule a time for pre-election set up
- ✓ Assign and review duties with judges and assistants
- ✓ Inform CBE if your relative (wife, husband, mother, father, daughter, son, sister or brother) will be a candidate during an election in which you are scheduled to serve as chief judge (G.S. 163-41.1)
- ✓ Confirm access or obtain keys to polling facility
- ✓ Check phone access at the polling facility
- ✓ Review the precinct observer list and submit any objections for good cause to the CBE (G.S. 163-45)
- ✓ Notify the CBE if unable to serve on an election day
- ✓ Receive voting equipment security keys or codes
- ✓ Receive ballots and equipment, compare to inventory lists and document ballot and supply custody exchange with a CBE member or staff
- ✓ Check your poll list to make sure it is complete and is the correct list for your precinct.

Day Before the Election or Before Polls Open

- ✓ Review duties with other precinct officials
- ✓ Administer the oath of office to any precinct officials that were not previously sworn in (G.S. 163-41)
- ✓ Make sure that all equipment has been delivered and that all booths and tables have been set up
- ✓ Mark off the boundaries for the voting enclosure, if necessary
- ✓ Post sample ballots at the polling place prior to opening the polls (G.S. 163-165.2)

Section 6: Precinct Officials

- ✓ Set up a demonstration area that includes sample ballots and voting instructions
- ✓ Complete the Election Morning Checklist
- ✓ Review chain of custody documentation with election judges and get their signatures
- ✓ Lock/secure voting area and supplies if set-up is done before election day
- ✓ Measure and mark the electioneering and buffer zone locations. Remove any campaign signs that violate electioneering laws
- ✓ Comply with facility rules concerning smoking, eating, etc. Federal law prohibits smoking inside of a school building
- ✓ Complete expense report sheets such as payroll, rent, etc.
- ✓ Keep ballots and poll lists in your possession until Election Day.
- ✓ Make sure that ballot boxes are empty and machine counter and/or tapes indicate zero votes

Election Day

- ✓ Arrive at the polling place by 6:00 a.m. to ensure the prompt opening of the polls at 6:30 a.m. as mandated by G.S. 163-166.01
- ✓ Administer the oath of office to any precinct officials not previously sworn in (G.S. 163-41)
- ✓ Put on precinct official vests and/or name badges
- ✓ Place signs for: designating the polling place, buffer zone, temporary/permanent accessible parking, accessible entrance, curbside voting place, voter's rights, voter instructions, sample ballots, no smoking signs, registration station, ballot station, help station, absentee list, etc.
- ✓ If a judge has not arrived before the polls open, notify the CBE immediately and appoint another person to act as precinct judge until the chairman of the CBE appoints a replacement (G.S. 163-41)
- ✓ Respond to any voter's request for assistance (G.S. 163-166.8[b])
- ✓ Maintain the arrangement of the voting enclosure (G.S. 163-166.2)
- ✓ Assist party observers
- ✓ Report any problems that may affect the election and any violations of election laws to the CBE
- ✓ Work in a non-partisan manner
- ✓ Be familiar with security, disaster and emergency plans
- ✓ Complete columns 1, 2 and 3 of the Balance Form during the day
- ✓ Enforce the electioneering buffer zone
- ✓ Follow voting procedures as directed by CBE and SBE
- ✓ Do not: accept bribes from candidates; commit fraud; make false statements or false writings in performing election duties

Polls Closing

- ✓ Announce the closing of the polls at 7:30 p.m. (G.S. 163-166.10)
- ✓ Record the name of every voter waiting in line at 7:30 p.m. and allow them to complete the voting process
- ✓ Sign the poll book immediately beneath the last voter's name
- ✓ Count votes
- ✓ Make unofficial reports of returns to CBE
- ✓ Complete column 4 of the Balance Form and sign
- ✓ Pack security container according to list attached to container
- ✓ Seal security container(s) and sign seal(s)
- ✓ Return all required materials to the CBE receiving station on election night unless otherwise instructed by CBE
- ✓ Complete ballot and supply custody documentation in the presence of a CBE member or staff

Duties & Responsibilities: Judges

Term Two-year appointment; August to August of odd-numbered years

Commitment Primary, general and special elections from 6:00 a.m. until all election supplies are returned to the elections office

Training Attend instructional meetings before each primary and general election

Duties

Once Appointed

- ✓ Take Oath of Office
- ✓ Meet with Director or other staff member of CBE to go over duties and responsibilities
- ✓ Attend mandatory instructional meetings and training workshops according to G.S. 163-82.24 and 8 NCAC 4.0305. Learn how to set up the polling place, use voting equipment, conduct regular and provisional voting, enforce electioneering laws (G.S. 163-166.4), assist disabled voters (8 NCAC 10B.0107), conduct curbside voting (G.S. 163-166.9 and 8 NCAC 10B.0108), accept voter name/address/party changes, conduct a hearing at the polls, open and close the polls (8 NCAC 10B.0102, -.0105), send election results to the CBE, account for ballots/equipment/supplies (8 NCAC 10B.0106), enforce security and emergency procedures.
- ✓ Inform the CBE if you are the spouse, child, spouse of a child, sister or brother of another precinct official in the same precinct. Serving in the same precinct as a near relative is prohibited by G.S. 163-41.1

Before the Election

- ✓ Attend all instructional meeting(s) prescribed by law and training workshops necessary in carrying out all duties and responsibilities for conducting an election (G.S. 163-46, 8 NCAC 10B.0101)
- ✓ Inform CBE if your relative (wife, husband, mother, father, daughter, son, sister or brother) will be a candidate during an election in which you are scheduled to serve as judge (G.S. 163-41.1)
- ✓ Assist chief judge in posting sample ballots at the polling place prior to the opening of the polls (G. S. 163-165.2)
- ✓ Notify the CBE if unable to serve on an election day

Day Before the Election or Before Polls Open

- ✓ Review duties with chief judge at polling place
- ✓ Make sure that equipment has been delivered to polling facility and that all booths and tables have been set up
- ✓ Assist with marking the boundaries for the voting enclosure, if necessary
- ✓ Assist with setting up a demonstration area that includes sample ballots and voter instructions
- ✓ Count ballots and supplies and sign custody documentation
- ✓ Lock/secure voting area and supplies if set-up is done before election day
- ✓ Assist with measuring and marking the electioneering and buffer zone locations. Remove any campaign signs that violate the electioneering laws
- ✓ Comply with facility rules concerning smoking, eating, etc. Federal law prohibits smoking inside of a school building

Section 6: Precinct Officials

Election Day

- ✓ Arrive at the polling place at 6:00 a.m. to ensure the prompt opening of the polls at 6:30 a.m. as mandated by G.S. 163-166.01
- ✓ Put on precinct official vests and/or name badges
- ✓ At the chief judge's request, announce at 6:30 a.m. that the polls are open and will close at 7:30 p.m.
- ✓ Place signs for: designating the polling place, buffer zone, temporary/permanent accessible parking, accessible entrance, curbside voting place, voter's rights, voter instructions, sample ballots, no smoking signs, registration station, ballot station, help station, absentee list, etc.
- ✓ If assigned, check the registration of voters at the registration station according to G.S. 163-166.7(a)
- ✓ Notify the chairman of the CBE immediately if chief judge does not arrive before the polls open. Act as chief judge upon request of CBE chairman until the chairman appoints a replacement or approves the selection of the chief judge (G.S. 163-41)
- ✓ Show voters how to use the voting equipment
- ✓ Respond to any voter's request for assistance (G.S. 163-166.8[b])
- ✓ Maintain the arrangement of the voting enclosure (G.S. 163-166.2)
- ✓ Assist party observers
- ✓ Report any problems that may affect the election and any violations of election laws to the CBE
- ✓ Work in a non-partisan manner
- ✓ Be familiar with security, disaster and emergency plans
- ✓ Perform required legal duties or face criminal consequences as set out in G.S. 163-274(1)
- ✓ Assist the chief judge with completion of the Balance Form during the day
- ✓ Assist the chief judge with enforcing the electioneering buffer zone
- ✓ Follow voting procedures as directed by CBE and SBE
- ✓ Do not: accept bribes from candidates commit fraud, make false statements or false writings in performing election duties

Polls Closing

- ✓ At the chief judge's request, announce at 7:30 p.m. that the polls are closed. Assist with taking the names of any voters in line at 7:30 p.m.
- ✓ Ensure the counting of the votes have been adequately and properly counted according to procedures and law
- ✓ Sign the poll book immediately beneath the last voter's name and the chief judge's name
- ✓ Count votes
- ✓ At the chief judge's request, make unofficial reports of returns to CBE
- ✓ At the chief judge's request assist with the completion of the Balance Form and sign
- ✓ Pack security container according to list attached to container
- ✓ Seal security container(s) and sign seal(s)
- ✓ At the chief judge's request, assist with the completion of the Election Night Checklist
- ✓ At the chief judge's request, return all required materials to the CBE receiving station on election night unless otherwise instructed by CBE
- ✓ If returning materials to the receiving station, complete ballot and supply custody documentation in the presence of a CBE member or staff

Duties & Responsibilities: Assistants

Commitment.....Primary, general and special elections from 6:00 a.m. until all election supplies are returned to the elections office

Training.....Attend instructional meetings before each primary and general election

Duties

Election Day

- ✓ Conduct elections at the polls according to the instructions issued by the board of elections and the North Carolina General Statutes
- ✓ Assist in miscellaneous ways as determined by the chief judge
- ✓ Respond courteously to the public
- ✓ Help make voter traffic run smoothly
- ✓ Serve as curbside official
- ✓ Give voter information or voting demonstration
- ✓ Monitor exit station in the polling place

Section 7: Pre-Election Day Preparation

This section gives an overview of the activities that occur before Election Day

Materials

- The Precinct Manual by Robert P. Joyce, Chapter 5
- Reference – Guide to Precinct Management

At the conclusion of this section, student will have a general understanding of:

- The responsibility for pre-election day preparation
- The Chain of Custody process for ballots, ballot boxes and voting machines

Section 7: Pre-Election Day Preparation

There are no additional handouts for this section. Use reference materials and county-specific materials for instruction.

Section 8: Accessibility

This section gives an overview of the laws and regulations regarding accessibility and an individual's right to vote.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 5 and 6
- Handout – Voter Assistance
- Video – Ensuring Equal Access
- Video – Accessible Precincts

At the conclusion of this section, student will have a general understanding of:

- The rights granted to disabled voters through federal legislation
- How to use the accessibility features of voting equipment and then demonstrate to others
- The curbside voting process
- The concepts for interacting sensitively with disabled and elderly voters.

Assistance to Voters

Eligibility for Assistance

Any registered voter qualified to vote in the election shall be entitled to assistance with entering and exiting the voting booth and in preparing ballots in accordance with the following rules:

- Any voter is entitled to assistance from the voter's spouse, brother, sister, parent, grandparent, child, grandchild, mother-in-law, father-in-law, daughter-in-law, son-in-law, stepparent, or stepchild, as chosen by the voter.
- A voter in any of the following four categories is entitled to assistance from a person of the voter's choice, other than the voter's employer or agent of that employer or an officer or agent of the voter's union:
 - A voter who, on account of physical disability, is unable to enter the voting booth without assistance
 - A voter who, on account of physical disability, is unable to mark a ballot without assistance
 - A voter who, on account of illiteracy, is unable to mark a ballot without assistance
 - A voter who, on account of blindness, is unable to enter the voting booth or mark a ballot without assistance

Procedures For Voter Seeking Assistance

- A qualified voter seeking assistance in an election shall, upon arriving at the voting place, request permission from the chief judge to have assistance, stating the reasons.
- If the chief judge determines that such assistance is appropriate, the chief judge shall ask the voter to point out and identify the person the voter desires to provide such assistance.
- If the identified person meets the criteria stated above, the chief judge shall request the person indicated to render the assistance.
- The chief judge, one of the judges, or one of the assistants may provide aid to the voter if so requested, if the election official is not prohibited.
- Under no circumstances shall any precinct official be assigned to assist a voter qualified for assistance, who was not specified by the voter.
- A person rendering assistance to a voter in an election shall be admitted to the voting booth with the voter being assisted.

Rules Governing Voter Assistance

- The person rendering assistance shall not in any manner seek to persuade or induce any voter to cast any vote in any particular way.
- The person rendering assistance shall not make or keep any memorandum of anything which occurs within the voting booth.
- The person rendering assistance shall not, directly or indirectly, reveal to any person how the assisted voter marked ballots, unless the person rendering assistance is called upon to testify in a judicial proceeding for a violation of the election laws.

Reference: GS 163-166.8.

Voter Assistance Statutes & Code

The following is an abbreviated law guide for Voter Assistance. It references North Carolina General Statutes and North Carolina Administrative Code:

Assistance to Voters GS 163-166.8 / 08 NCAC 10B.0107

A. Who is entitled?

1. Any voter may request assistance from near relatives:
 - Spouse (husband, wife)
 - Sibling (brother, sister)
 - Parent (including in-law and step relations)
 - Child (including in-law and step relations)
 - Grandparent
 - Grandchild
2. Voters that can request and receive assistance from anyone
 - voters with disabilities
 - Illiterate voters
 - Blind voters
3. Assistance cannot be given by:
 - Voter's employer
 - Agent of the employer
 - Officer or agent of the voter's union

B. To receive assistance:

1. Voter must request assistance
2. Must state reasons for such request; precinct officials should make every effort not to embarrass the voter

C. Restrictions

1. Precinct officials must not offer assistance
2. Person assisting cannot attempt to persuade voter
3. Person assisting must leave voting booth immediately after assisting unless voter requests further accompaniment

Curbside Voting G.S. 163 – 155

- A. Voters unable to enter the voting place will be allowed to vote curbside
- B. Takes place in the vehicle bringing the voter to the voting place or the immediate proximity
- C. Process executed by precinct official designated by the chief judge
- D. Procedure
 - 1. Precinct official takes affidavit to disabled voter
 - 2. Precinct official administers oath
 - 3. Voter completes affidavit
 - 4. Voter given ballot
 - 5. Voter and any assisting person are entitled to the same assistance and subject to the same restrictions in marking the ballots as is authorized by G.S. 163-166.8 and 08 NCAC 10B.0107
 - 6. Precinct official takes signed affidavit to one judge and marked ballot to the other judge who deposits the ballot into the appropriate voting equipment
 - 7. Judge handling the poll book will then record the voter's name as a regular voter
 - 8. The signed affidavit will be brought to the county board of elections with other election day forms

Handicapped Transfers

A. Handicapped Transfer on Election Day. 08 NCAC 08.0101 Anyone entitled to curbside voting (163-166.9) may, in lieu of curbside voting, request to be allowed to vote at the office of the county board of elections

- 1. Must request transfer to accessible polling place
- 2. Precinct judge will issue a certificate on the prescribed form
- 3. Voter's registration will be marked with "HT"
- 4. Voter will go to the county board of elections office and will receive proper ballots
- 5. After marking, voter will place ballots in provided envelope with required information on it
- 6. County board of elections office will enter name of each voter permitted to vote under this rule as provided by CBE
- 7. Envelope will be retained and opened after polls are closed

B. Handicapped transfer prior to Election Day. 08 NCAC 08.0104

- 1. Handicapped or elderly persons can apply to be transferred to the county board of elections in advance of election day; signed only by the voter or voter's near relative or legal guardian
- 2. Upon verification, county board of elections will designate "HT" beside voter's name on registration records sent to the voter's precinct on election day
- 3. No voter with "HT" next to his or her name can vote at the precinct

**North Carolina State Board of Elections
Accessibility Checklist for Voting Place Setup**

This checklist should be completed by the chief judge or One-Stop site supervisor prior to opening a voting site for in-person voting, to ensure the compliance of the voting place with the standards set in the Americans with Disabilities Act.

County: _____ **Precinct/One-Stop voting site #:** _____

Polling place/One-Stop site name (of building): _____

Person conducting check: _____ **Date:** _____

Parking	Yes	No
Are there signs or labels to clearly designate disabled van-accessible parking (with an access aisle at least 96 inches wide)?		
If the parking area is not paved, is a temporary mat in place?		
Pathways		
Are signs pointing to accessible routes to the voting place entrance along the path of travel?		
If necessary, are there ramps for persons with disabilities to access the entrance to the voting place?		
Signs & instructions		
Are all necessary signs in place, understandable, visible, and easy to read?		
Are voting instructions, sample ballots and other voter materials in plain sight of the voting enclosure entrance?		
Are communication devices available for hearing and speech impaired voters (such as pen and paper)?		
Voting enclosure		
Is the path to the voting booths free from barriers, including removable mats, rugs and loose extension cords?		
Are tables spaced at least 3 feet apart?		
If there are protruding objects on the wall in the path of travel, such as fire extinguishers: Has another object (such as a chair or trashcan) been placed underneath to prevent a voter with a visual disability from running into the protruding object?		
Voting booths & privacy		
Are voting booths or alternate voting areas available that can accommodate a voter in a wheelchair (with a lower writing surface and with leg clearance wide enough underneath for a wheelchair)?		
Do all voting apparatus (including wheelchair-accessible voting booths or AutoMark voting machines) offer the same level of privacy to voters with disabilities as is available to all other voters?		
Curbside voting		
Is the voting site curbside voting-ready?		
Is an election official stationed at or within view of the the curbside voting area at all times, or is a notification system in place?		

Section 9: Setting Up the Polling Place

This section gives an overview of the activities and requirements necessary for setting up the polling place.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 5 and 6
- Handout – Polling Place Models
- Handout – Equipment Startup
- County-specific handouts on opening the polls

At the conclusion of this section, student will have a general understanding of and practical experience on:

- How to mark voting enclosure boundaries
- How to arrange tables and equipment within polling places for efficient voter flow and sensitivity to disabled voters
- How and where to post signs in and around the voting enclosures, voting place and designated parking areas
- How to set up and operate voting equipment

Morning paperwork

Take the election judge oath

Locate the Election Judge Oath in your supply kit. The chief judge administers the oath to all judges and assistants who did not take the oath at their instructional meeting. All judges and assistants must sign the oath. A judge administers the oath to the chief judge.

Payroll form(s)

Each judge and assistant must fill out their payroll forms and indicate the time that they arrived at the polling place. These forms must be completed and returned as instructed by the county board of elections.

Judge vests

Each judge wears a judge's vest so that voters can identify them easily. Chief judges wear red vests and judges wear blue vests. Wear vests during the entire day.

Record the number of ballots

Count the number of paper ballots and record the number on the custody form provided by the county board of elections. Record the total number of ballots and, if your polling place has more than one ballot style, record the total number of each style on the form.

Election Judge Oath

(The chief judge must administer the following oath to each judge and assistant before voting begins. A judge must administer the oath to the chief judge.)

I, _____, do solemnly swear (or affirm) that I will support the Constitution of the United States; that I will be faithful and bear true allegiance to the State of North Carolina, and to the constitutional powers and authorities which are or may be established for the government thereof; that I will endeavor to support, maintain and defend the Constitution of said State not inconsistent with the Constitution of the United States; that I will administer the duties of my office as chief judge of (judge of election in) (assistant in) _____ precinct, _____ County, without fear or favor; that I will not in any manner request or seek to persuade or induce any voter to vote for or against any particular candidate or proposition; and that I will not keep or make any memorandum of anything occurring within a voting booth, unless I am called upon to testify in a judicial proceeding for a violation of the election laws of this State; so help me God."

Election judge name

Election judge signature

Date

Address

Duty Stations

There are four duty stations in each polling place. Judges may serve in more than one station, or assistants may be assigned to some stations.

Registration Station

One judge (or assistant) from each major political party must serve at the registration station. Judges at this station check the registration list to verify whether a voter is registered and eligible to vote.

Ballot Station

At least one judge or assistant serves at the ballot station. Judges at this station issue or activate ballots for voters who have been determined to be registered and eligible to vote.

Help Station

At least one judge or assistant serves at the help station. Judges at this station help people whose names are not found on the registration list, or people who have changed their name, address or party affiliation without informing the CBE. Judges at this station may also handle any problems that arise at the polling place on Election Day.

Exit Station

One judge or assistant serves at the exit station in polling places where paper ballots are used. Judges at this station make sure that regular ballots are properly deposited into tabulators or ballot boxes. Judges at this station make sure that provisional ballots are kept separate from regular ballots, and make sure that voters do not leave the polling place with a ballot.

Demonstration Station

One judge or assistant monitors the demonstration station. Judges monitoring this station help people who want instruction in how the voting equipment works or in how to mark a ballot.

Judges and assistants may change duty stations during the course of the day. Judges must remain in the polling place from the time that they arrive until the time that the polling place closes and their duties are finished. Judges must bring any items with them that they may need during the course of the day, such as food and medication. All three judges must maintain a "continuous presence" together throughout the day and may not leave to run errands, to get food, etc.

Judge Stations Set-up

Registration Station

At the registration station, judges verify that each person who presents themselves to vote is duly registered. The registration station needs:

- Two judges, one from each party
- Voter registration list(s)
- Authorization to vote forms or pollbook
- Voter registration applications
- Sample ballots
- Judges' manual
- Curbside affidavit (if using pollbook)
- Privacy envelopes for curbside ballots

Ballot Station

The ballot station issues ballots to eligible voters. This station should have:

- At least one election official
- Binder or post to hold ATV forms or ballot access forms
- Ballots (optical scan) or PEBs (iVotronic)
- Supervisor terminal (iVotronic)
- Judges' manual

Help Station

At the help station, judges assist voters whose registration information is incorrect or missing from the registration list. The registration station needs:

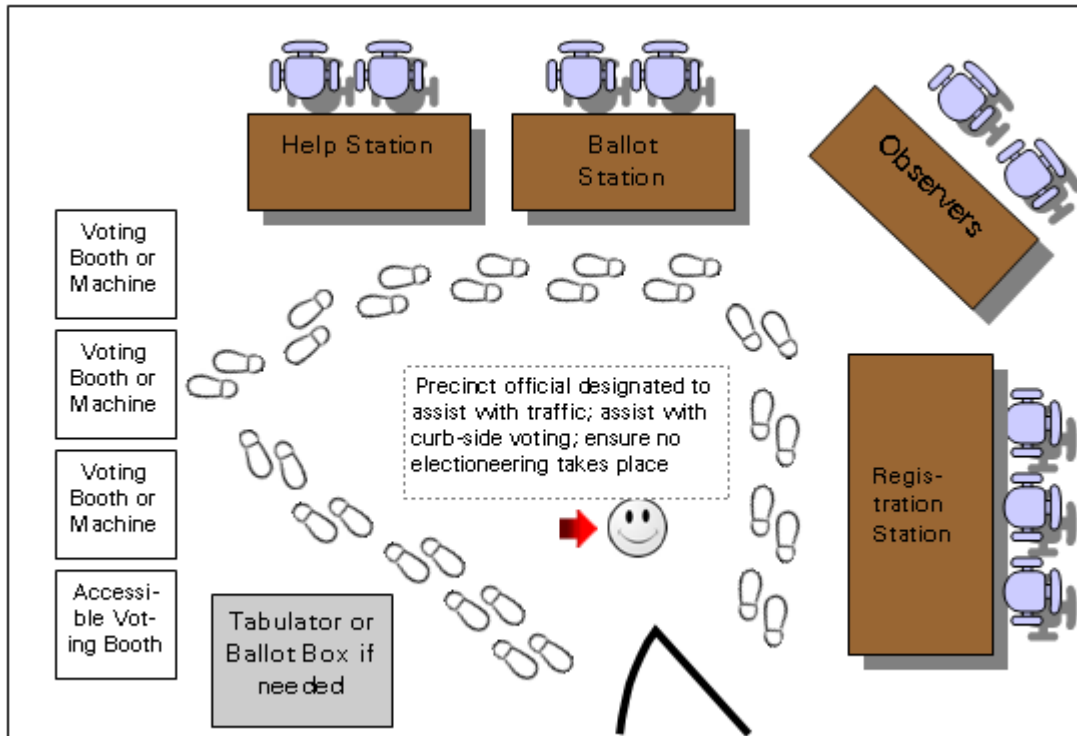
- At least one official
- Change of address form (if using pollbook)
- Provisional ballots
- Provisional ballot envelopes
- Provisional pin numbers
- Provisional pollbook
- Provisional voter instruction sheet
- County address list (for identifying precincts for unreported move voters)
- Judges' manual
- Contact numbers
- Cell phone
- Precinct Manual by Robert P. Joyce
- Seals, security envelopes/boxes, etc.
- Spare v.v.p.a.t. paper (iVotronic)
- Supplies

Polling Place Layout

The following pages are polling place layout suggestions based on descriptions from the statutes.

- ✓ Model for precinct setup for Small Size Precinct
- ✓ Model for precinct setup for Average Size Precinct
- ✓ Model for precinct setup for Large Size Precinct
- ✓ Model for precinct setup for Large Size Precinct / Separate Entrance/Exit

Polling Place Model: Small Size



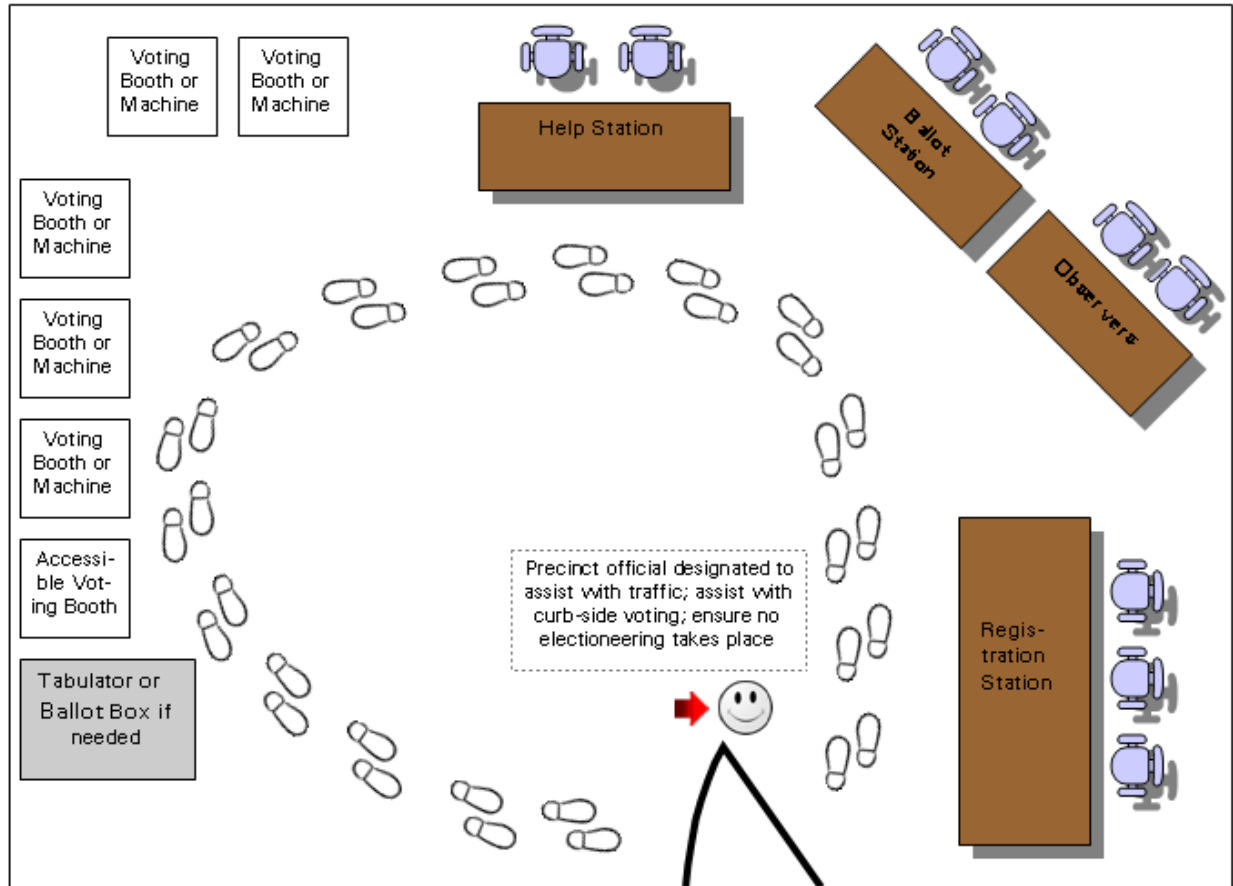
Polling Place Dimensions: 30' x 40'

Number of voting booths/machines: 4

Potential problems:

- **Room size potentially insufficient**
- **Long Lines**
- **Bottleneck at door**

Polling Place Model: Medium Size



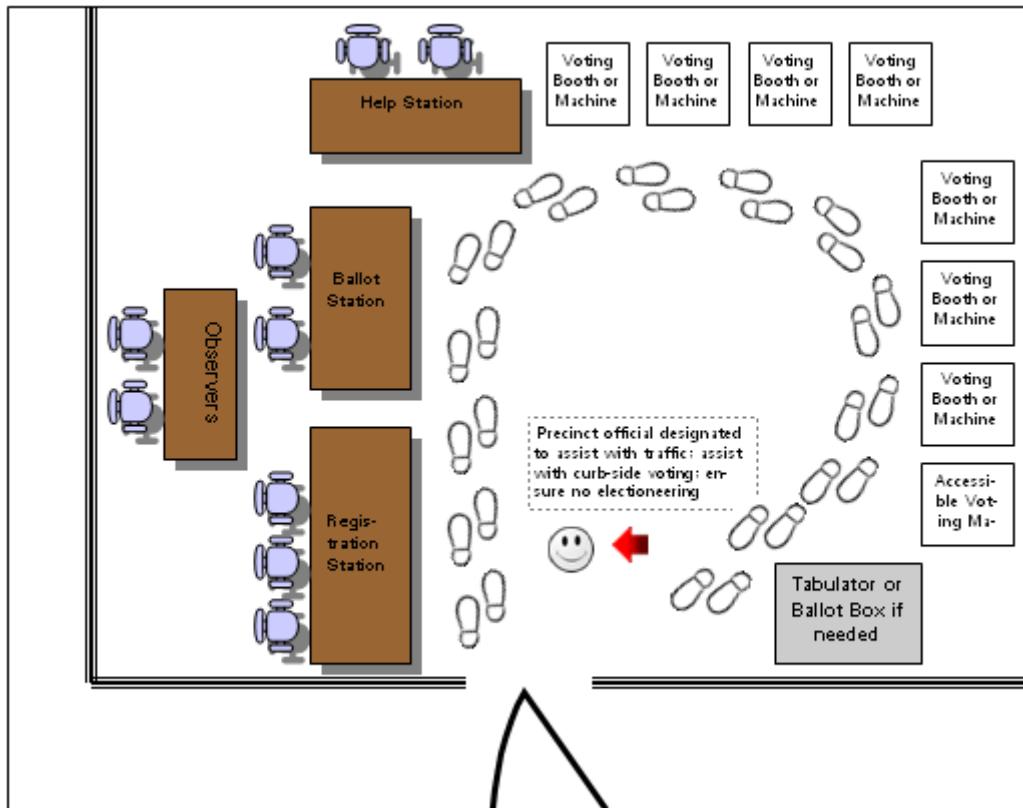
Polling Place Dimensions: 100' x 100'

Number of voting booths/machines: 6

Potential problems:

- **Long Lines**
- **Bottleneck at door**

Polling Place Model: Large Size

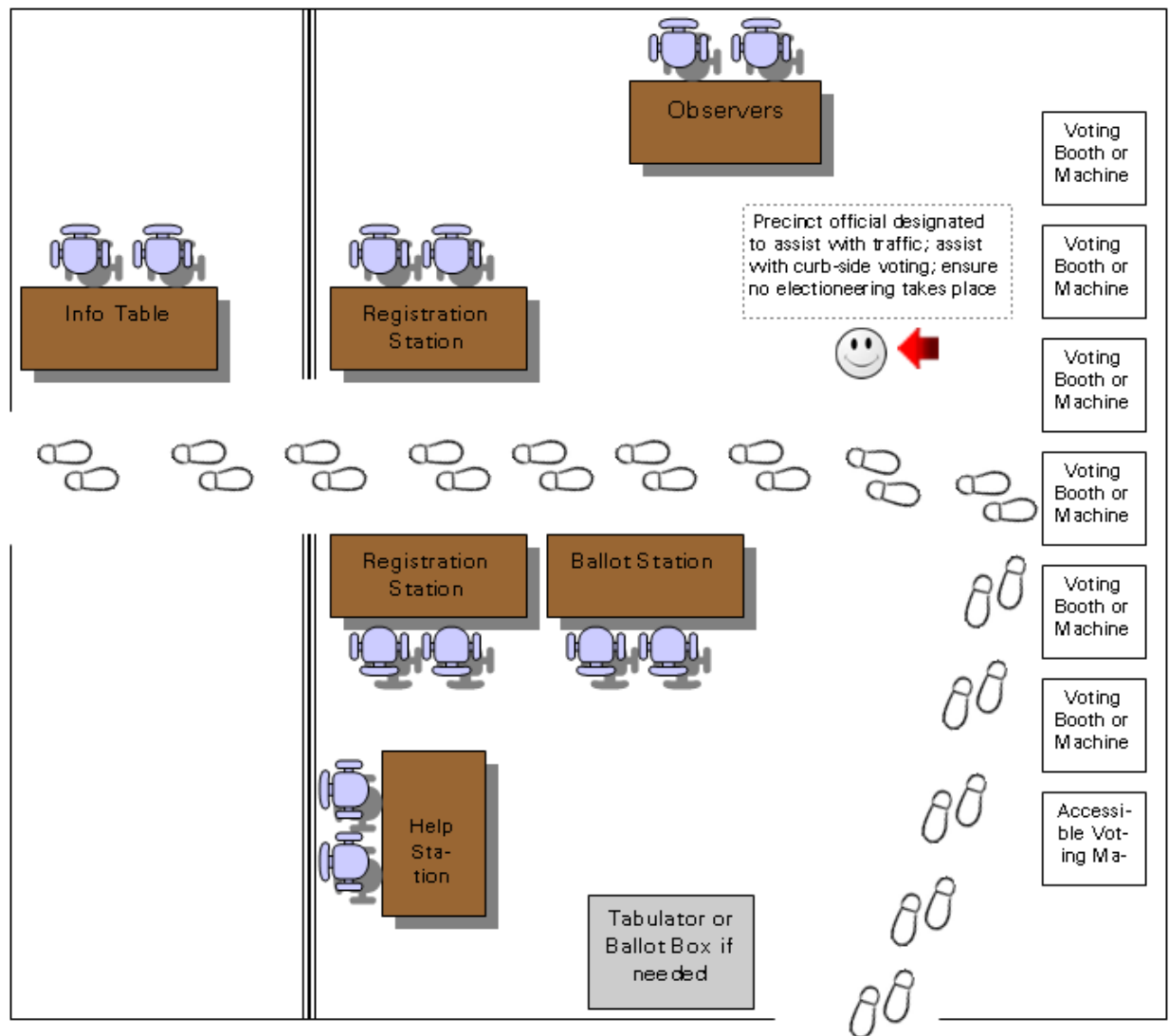


Polling Place Dimensions: 150' x 150'
Number of voting booths/machines: 8
Potential problems:

- Long Lines
- Bottleneck at door

Polling Place Model:

Large with Separate Entrance and Exit



Polling Place Dimensions: 150' x 100'
Number of voting booths/machines: 7

Post Signs and Notices

Inside the polling place

Post each of the following items where voters can read them prior to voting:

- ☐ Precinct identification
- ☐ Voting rights wallpaper
- ☐ Absentee list
- ☐ Sample ballot(s)
- ☐ Ballot instructions
- ☐ Spanish instructions where needed
- ☐ Table signage (registration station, ballot station, help station)
- ☐ Accessible voting booth

Outside the polling place

Post each of the following items outside the voting place:

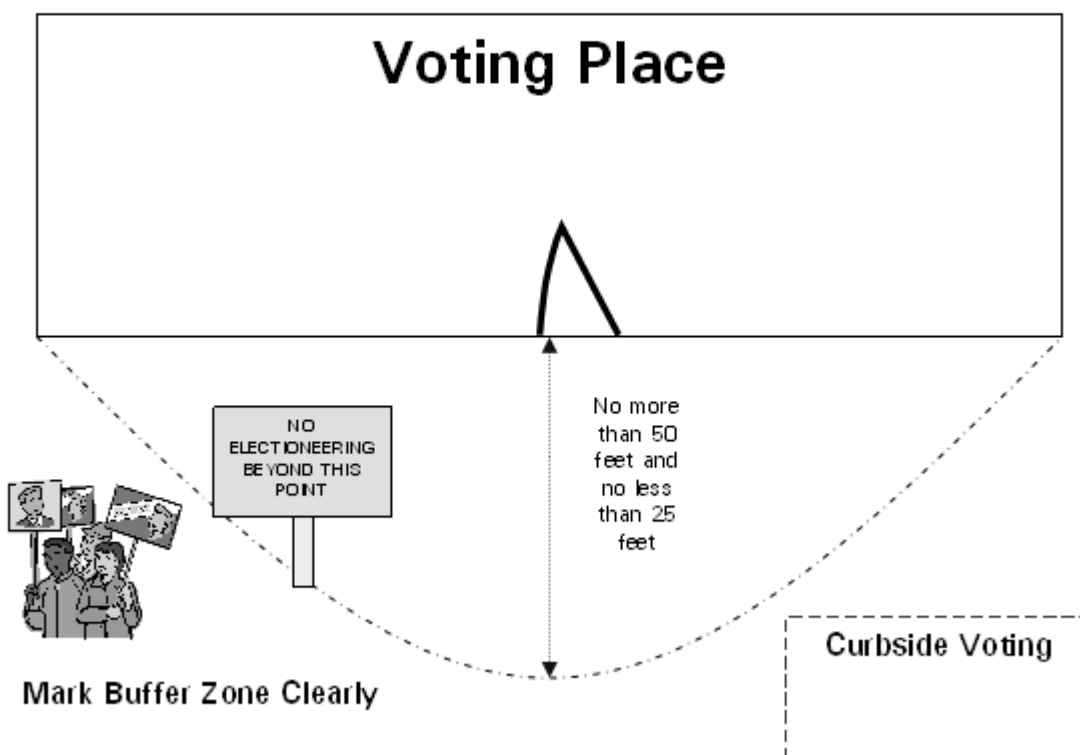
- ☐ Signs designating the polling place must be placed on the exterior doors leading into the building where the polling place is located
- ☐ If the main outdoor entrance is accessible to persons in wheelchairs, post an accessible entrance sign on the outside of the door
- ☐ If the main outdoor entrance is not accessible to persons in wheelchairs, but another entrance is, post an accessible entrance sign on the outside of the accessible entrance door, and a sign pointing to the accessible entrance on the outside of the main door

Electioneering Buffer Zone

- ☐ Election judges must measure 50 feet from the entrance to the voting place and mark the boundary with the tape or string provided in the supply kit. Remove all campaign signs and materials from this area, and keep campaign workers beyond the buffer zone while the polls are open
- ☐ Post signs marking the area where electioneering is permitted

Buffer Zone Model

Electioneering Buffer Zone Model



Setting Up the iVotronic

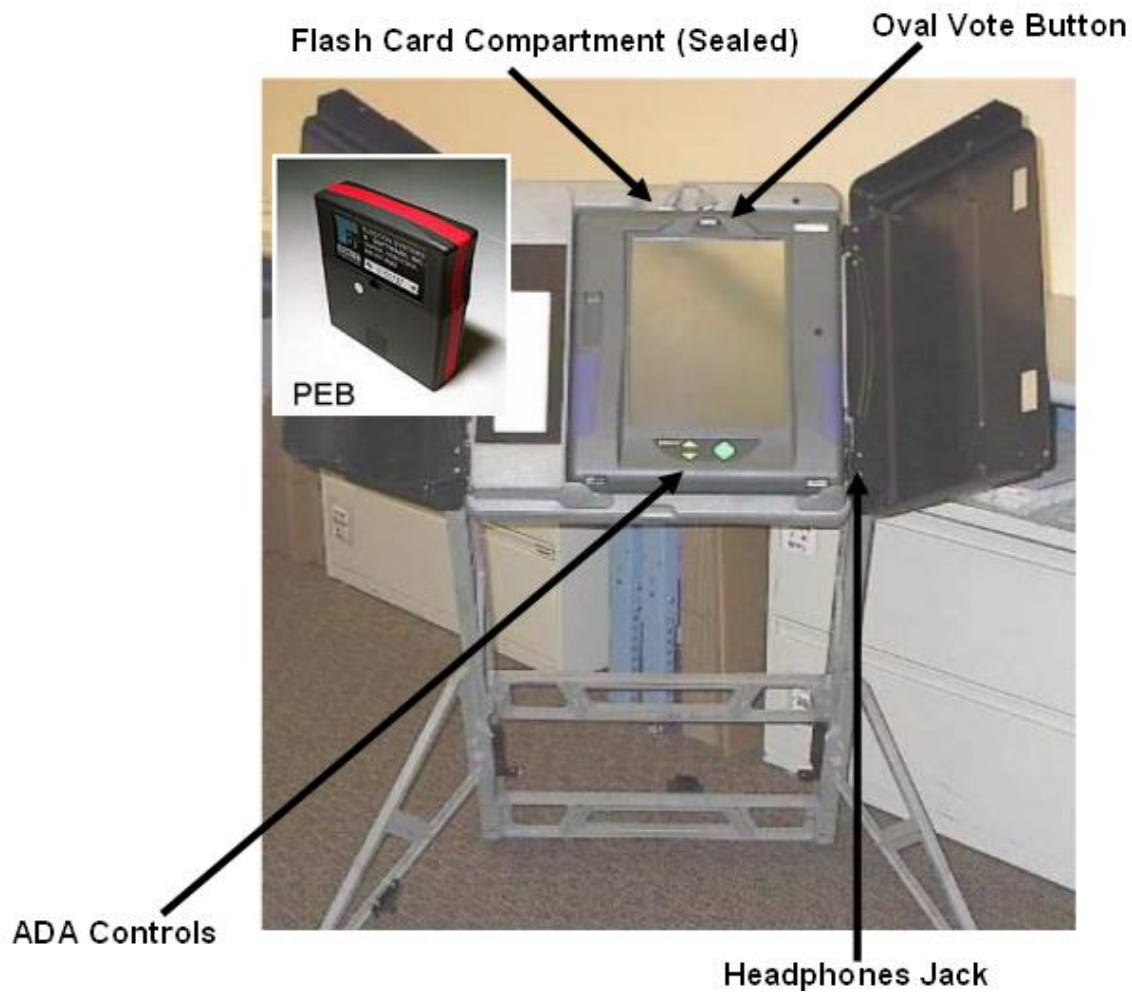
The key components of the iVotronic machine are:

- The terminal screen
- The terminal is connected to a RTAL (real time audit log) printer that produces a paper trail of all votes cast on this terminal. The terminal will not operate without being properly connected to the RTAL printer
- The gray cable at the top of the terminal is the RTAL printer cord which connects the two devices
- The black cord beside the RTAL cable connection is the power cord and should remain plugged in at all times so avoid draining the internal battery



Key iVotronic components, continued:

- An oval VOTE button at the top of the terminal
- ADA-compliant audio ballot control buttons and head phones
- A top slide door with a flash card inside
- A communication or printer pack used to print the zero and results tapes
- A Master PEB, used only to open and close the polls
- A Supervisor PEB to activate each ballot that will be voted on the terminals



Setting up the iVotronic:

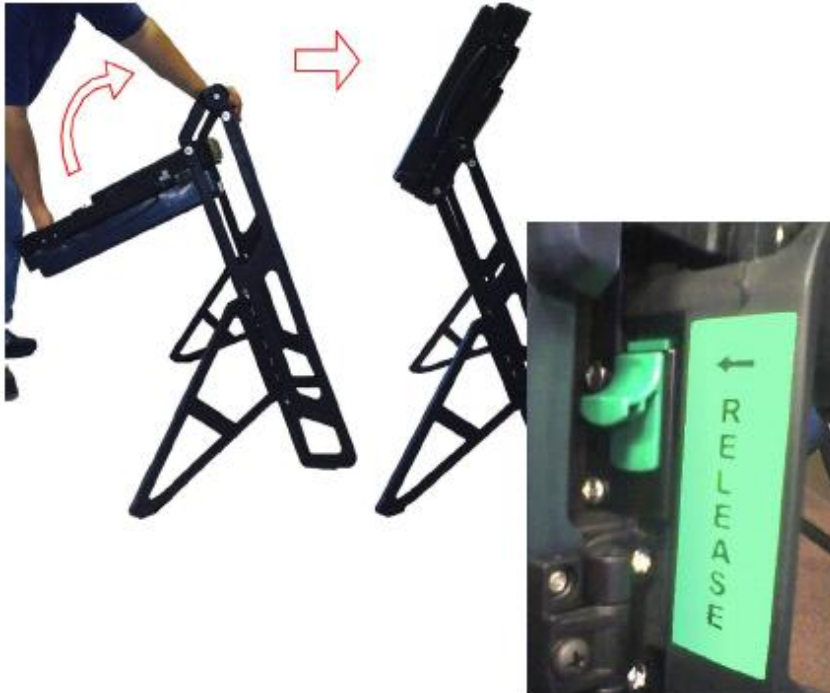
1. First, roll the iVotronic unit to the desired location in your polling place
2. Lay the unit flat on the floor with the legs on top/wheels on bottom
3. Unlock the legs from the middle lock and spread them open to become a stand. Push up on each leg to lock them into place. Do not force the legs or pull them farther than they need to go. They may break off.



4. To bring the terminal to a standing position, pick up the corners of the unit using the side handles on the top beside the wheels. Never grab the middle bar.



5. Once the unit is standing on the legs securely, lift the box portion of the unit up to an upright and locked position. When correctly positioned, the box snaps in place and is at a 45-degree angle. (NOTE: Verify that the release catch is properly engaged.)



6. Open the privacy terminal screen doors outward from the center. You may need to cut a security seal before doing this step. The doors resist further opening when they are fully extended.



- *NOTE: If the security seal is broken when you arrive, contact your county board of elections immediately.*
- *Make certain to record and store the security seal as instructed by your county office.*

7. Now that you have opened the booth doors, the terminal serial number is visible in the lower right hand corner. Record the serial number of each terminal as instructed by your county office.
8. Next, unwrap the electrical cord from the back of the terminal. Plug the first terminal into a wall outlet or drop cord, depending on the distance.
9. The remaining terminals may be "daisy-chained" by plugging one into the power strip on the back of the next terminal. *(See yellow arrow in photo)*



- *Up to ten terminals may be "daisy-chained" together in a row*
- *Additionally, you may want to face the voting terminal screens toward a wall to provide added privacy for voters*
- *Your iVotronic booths are now fully assembled*

Setting Up the Model 100

1. On Election Day morning, roll the Model 100 ballot box to the desired location in your polling place

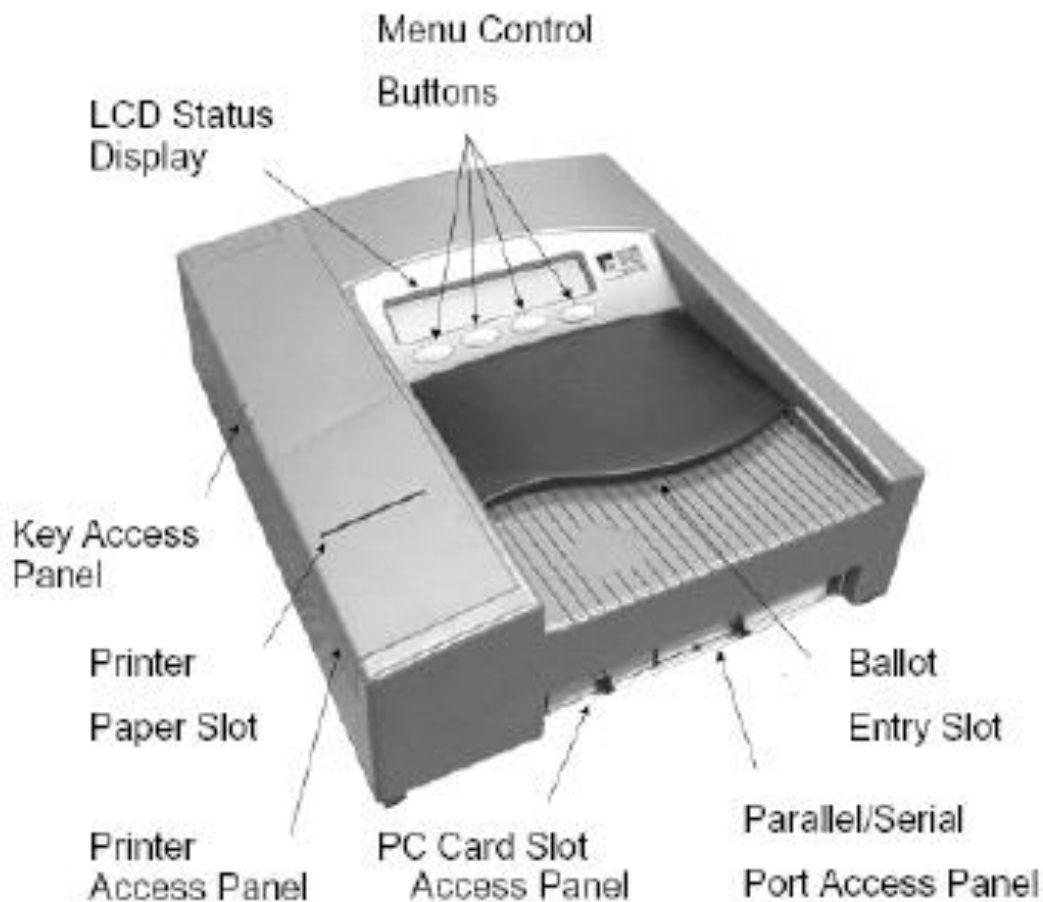


2. Next, open your Model 100 carrying case



3. Inside the carrying case you will see your Model 100 voting machine. Notice the following items on your machine:

- LCD status display screen
- Beneath the LCD status display screen are the Menu control buttons for opening and closing the polls
- Printer Access panel
- Printer paper slot for printed tape output
- Ballot entry slot, where voted ballots are fed
- Power entry, located in the back, for the electrical cords



4. Find the keys in your storage box to unlock the ballot box – one key opens all the locks. Unlock the front hinged door and let it swing downward.



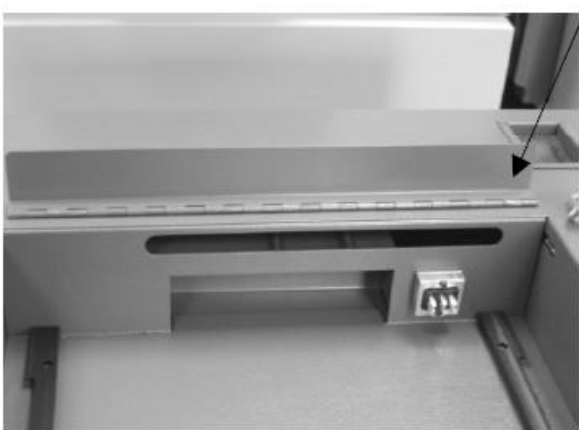
5. Next, retrieve the power cord from inside the Model 100 storage box
 - *Inspect the power cord for damage. If the cord is damaged, contact your county office*
6. Insert the female end of the cord through the back opening on the left side of the ballot box



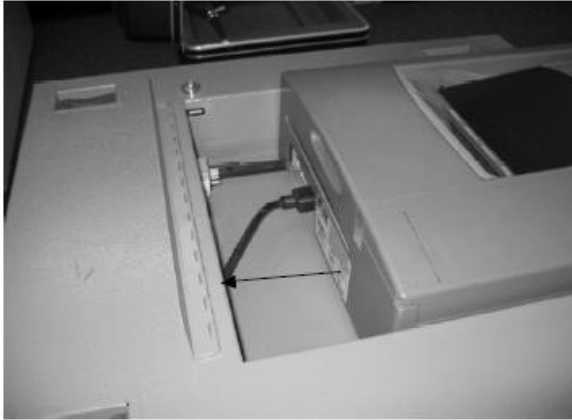
7. Thread the cord through the opening on the back of the ballot box until it appears through the slot at the back of the top recessed area. Pull the cord until it extends a few inches into the recessed opening.



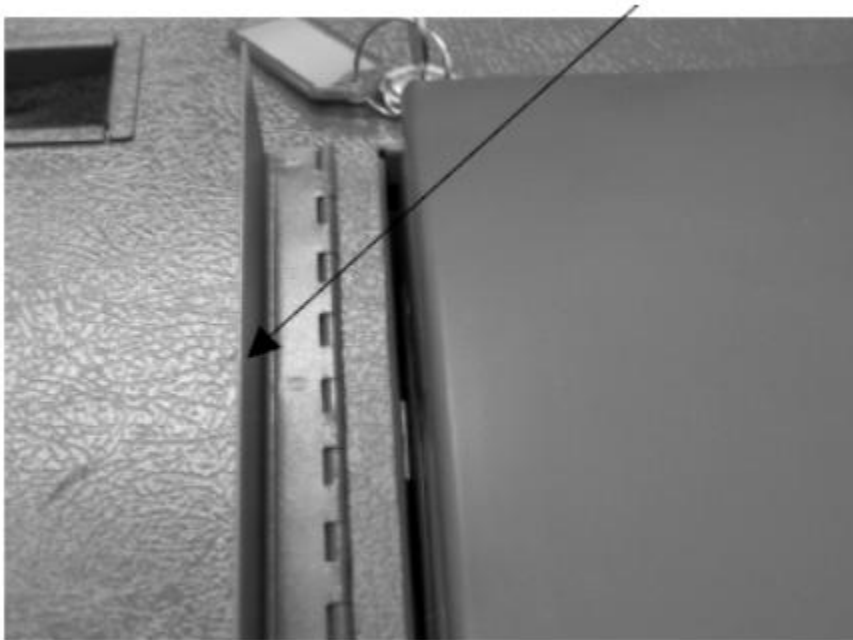
8. Unlock and open the Counter Access Panel towards the back of the scanner bed, which reveals the ballot slot. Make certain this panel is in the up position.



9. Place the scanner about a third of the way into the recessed area and slide it on the mounting rails until it is four to five inches from the back of the recessed area/ballot slot. Plug the power cord into the back of the scanner.



10. Slide the scanner until it is snug against the back of the ballot box ensuring that the diverter connector at the back of the scanner connects to the port on the ballot box. *Once again, note that the Counter Access Panel is in the up position.*



11. Now that your scanner has been loaded onto the ballot box, plug the power cord into a wall outlet. If the cord is plugged in incorrectly, the message, "NO-AC" will appear when you turn on the scanner.
- *You must ONLY plug the scanner into a grounded, three-pronged electrical outlet. Plug ONLY one scanner into an outlet. ES&S recommends that you do not use an extension cord.*

12. Check both ballot box compartment side doors and the emergency/auxiliary ballot bin on the front to verify that the ballot compartments are empty. Close and lock all doors including the front hinge panel door in the up position.



Loading the PCMCIA Card

1. You may have to insert a PCMCIA election card into the front of the Model 100 scanner. If your county requires this procedure you will need to open the front of the scanner and install the PCMCIA card containing ballot information for this election into the top slot. The eject button will stick out when the card is installed properly.



2. Once you install the PCMCIA card, you will seal the card in place with a security seal provided to you by your county board of elections
3. Close the scanner door and lock the hinged panel to secure the scanner into the ballot box

Setting Up the AutoMARK™

Prior to Opening the Polls

- The following are key components for the AutoMARK™ system:
 - One set of headphones for visually impaired voters
 - One compact flash card with the election definition – this will be installed by the county board of elections office and sealed prior to delivery to the polls
 - One power cord
 - One key (brass colored)
 - One print cartridge
 - One container of alcohol wipes
 - A wheelchair accessible table which is 36" from tabletop to floor
 - Ballot security sleeves (optional)

Set-Up Process

1. First, you will place a table in the desired location in your polling place. *(If you do not have an AutoMARK™ stand, a sturdy table may also be used.)*
2. Next, open the storage case by lifting up on the latches and turning them counter-clockwise
3. With one pollworker on each side of the machine, place your fingers in the grooves and lift the machine from the case and place it on the table. Position the AutoMARK™ on the table such that the screen compartment faces away from the view of passing voters.



4. Plug in the AutoMARK™ by inserting the appropriate end of the power cord into the slot in the back and the other end of the cord into the wall outlet. *(If you notice any damage to the power cord, contact the county board of elections.)*
5. Move the lid latches towards the outer edge to open the lid



6. Fold back the front lid



7. Lift the panel. Pull the screen into an upright position



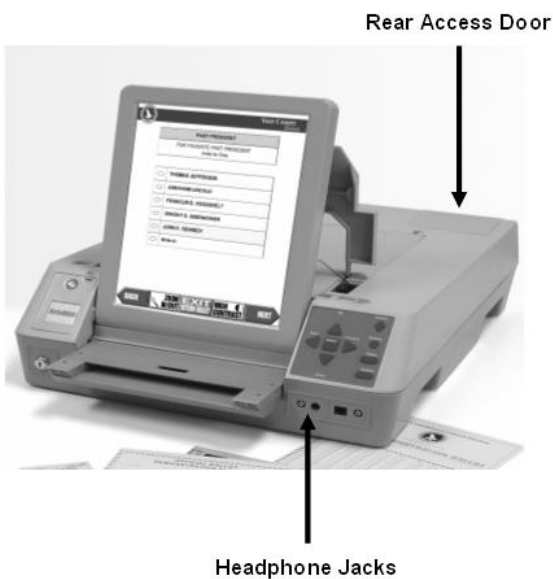
8. Place/push the panel down and allow the screen to rest against the panel



9. Pull up on the ballot feed tray, then pull it towards you and lower it into position



10. Plug the headphones into the appropriate headphone jack in front of the terminal and open the rear access door



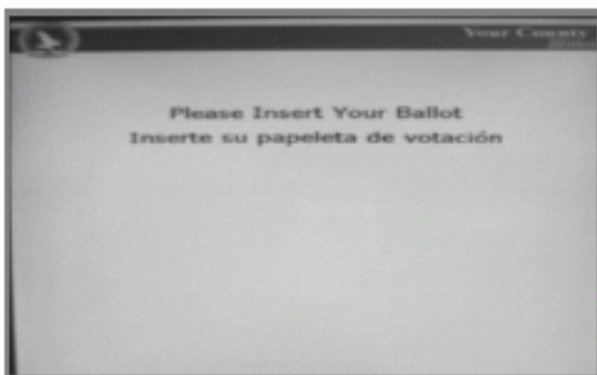
11. Insert the ink cartridge. (*NOTE: Remove the tape on the cartridge.*) The ink cartridge will have a plastic "grip" at the top. This "grip" should be sticking up and away from the machine
12. Close the rear access door

Turning on the AutoMARK™

1. Once you have completed the preparatory set-up you are now ready to start the AutoMARK™
2. Insert the brass key into the key-operated mode switch in the lower front left corner of the machine and turn the key to the middle or ON position



3. Once the "Insert Your Ballot" screen appears, remove the key and secure it as instructed by the county board of elections. It will take several minutes for this screen to appear.



4. The AutoMARK™ is now ready for use

Section 10: Opening the Polls

This section gives an overview of the activities and requirements necessary for opening the polling place.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 5, 6 and 7
- Handout – Instructions for operating voting equipment with polls open
- Handout – Media Rules

At the conclusion of this section, student will have a general understanding of and practical experience on:

- The duties and responsibilities of precinct officials
- How to administer the Oath
- How to maintain order on election day
- The policies and procedures regarding voting enclosures
- Electioneering laws
- How to print a zero tape and operate voting equipment

Sample Election Morning Checklist

Make sure each item has been done before opening the polls.

- ☐ Call the elections office if any precinct officials do not show up at 6:00 a.m.
- ☐ Chief judge administers oaths to all officials who did not receive oaths at instructional meeting. A judge administers the oath to the chief judge.
- ☐ Chief judge and judges verify delivery of paper ballots. Judges sign ballot and supply custody documentation. Complete section 1 of Balance Form.
- ☐ Set up tables for registration, ballot, help and demonstration stations if not done by Monday
- ☐ Set-up voting equipment. Make sure ballot boxes are empty, if applicable. If there is a problem, call the CBE immediately.
- ☐ Print zero tapes. All 3 judges must sign the zero tapes
- ☐ Post "Vote Here" sign outside the polling place
- ☐ Post curbside and handicapped entrance signs and call bell (if applicable)
- ☐ Mark & post executed absentee ballot list (This list is in your supply kit. If there are any updates a new list will be delivered by 10:00 a.m.)
- ☐ Place trash cans near exit
- ☐ Complete and sign pay forms
- ☐ Mark electioneering buffer zone (50 feet from polling place entrance beyond which all campaign materials, signs, and campaigners must remain during the day)
- ☐ Remove any signs that may have been placed within the buffer zone
- ☐ Synchronize your watches with the voting equipment at the polling place
- ☐ Chief judge reviews duties of each judge and assistant
- ☐ Turn on cell phone and leave on all day
- ☐ Make sure cell phone is plugged in to a working power outlet
- ☐ Review voter flow one last time with all precinct election officials
- ☐ At 6:30 a.m. go outside and announce, "The polls are now open from 6:30 a.m. until 7:30 p.m."

Voting Enclosure

In addition to election judges, assistants, and voters in the act of voting, specific individuals are allowed inside the voting enclosure while the polls are open. These individuals must not disrupt or interfere in the election process.

County Board Members and Staff

Members of the county board of elections and members of the office staff are allowed inside the polling place. These individuals may check or repair equipment, assist election judges as needed, and observe polling place procedures.

District Election Technicians and repair staff

These individuals may be present to check or repair equipment and assist election judges as needed.

Observers/Runners

During partisan elections, the chair of each political party may appoint two observers to be present in each polling place. Unaffiliated candidates may also appoint two observers to be present in each polling place in which their name appears on the ballot. Candidates may not serve as observers. In some polling places, a runner may be appointed in lieu of an observer. Runners may be present to receive a voter list.

Voter assistants

People authorized to assist a voter may be present while in the process of providing assistance.

Voter challengers

Voters entitled to challenge other voters may be present in the voting enclosure while entering or explaining a challenge. The challenger must leave the voting enclosure as soon as the challenge is entered.

Minor children

Minor children in the care of the voter may be present in the voting enclosure while the voter is in the process of voting.

Law enforcement officials

These individuals may accompany election judges or assistants who are transporting ballots or voting supplies. They may also be called by a chief judge or judge to maintain order.

Media

Members of the news media (reporters and photographers) are allowed to enter polling places to take panoramic photographs or videos of the voting place, but are not permitted to record identifiable voters in the process of voting. Members of the media must identify themselves to the chief judge upon entering the polling place.

Kids Voting

People conducting or participating in simulated elections that have been approved by the county board of elections may be present within the polling place.

Opening the Polls and Voting

Polls are open from 6:30 a.m. until 7:30 p.m. on Election Day. In extraordinary circumstances, the county board of elections or a federal or district court may order that the polls remain open until 8:30 p.m.

- The chief judge announces promptly at 6:30 a.m. that the polls are open and states the hour at which they will close
- State law requires that the chief judge, judges and assistants remain together (continuous presence) at the polling place from 6:00 a.m. until all the votes are counted. The purpose of this law is to prevent election fraud and to have the burden of work shared equally. Judges and assistants may not leave for meals or to run errands; arrangements should be made in advance for these matters.
- The chief judge should designate officials for each station including assignments for curbside voting, Election Day transfers and provisional voting.
- A list of absentee voters is in your supply kit and should be compared to the registration list and posted. If additional absentee voters need to be added to your registration list, they will be delivered on election morning.
- Spouses may occupy a single voting booth at the same time
- All voters must leave the voting enclosure immediately after voting. Socializing should be done outside the enclosure.
- Election officials should keep conversation to a minimum while voters are in voting booths. Officials should not engage in political discussion at any time. No radios, newspapers or televisions are allowed in the voting enclosure.
- Anyone waiting in line when the polls close may still vote. An official should go to the end of the line and write down the names of people waiting in line, working from the last person forward to the first person in line. The official must present this list to the officials at the registration station. Only those people whose names appear on the 7:30 list are able to proceed with the voting process. One official should remain with those in the line to maintain order.

Electioneering

What is electioneering? Any person or group seeking to influence voters by:

- ☐ Distributing campaign information by hand or voice
- ☐ Displaying campaign signs
- ☐ Wearing campaign T-shirts, hats, pins, buttons while loitering or congregating

PROHIBITED!

Electioneering within 50 feet of the entrance to the building

For precinct officials: Between 6:30 a.m. and 7:30 p.m., election officials should enforce the electioneering buffer zone by:

- ☐ Keeping the buffer zone free of campaigners and campaign signs
- ☐ Clearing voting booths of campaign literature left behind by voters
- ☐ Providing a trash can in the voting enclosure in which voters may discard campaign items if they choose to
- ☐ Refraining from wearing clothing, pins, etc. that display a preference for a candidate or political party

For voters: The following are **not** considered examples of electioneering when worn or carried while in line to vote or while in the act of voting:

- ☐ Campaign hats
- ☐ Campaign pins
- ☐ Campaign T-shirts
- ☐ Campaign literature

REMEMBER!

The voter has the right to freedom of expression under the First Amendment

Media Rules for Polling Places

- Members of the media have a First Amendment right to report on matters of public interest, including elections
- Members of the media must identify themselves to the chief judge
- Members of the media must conduct media polls and interviews at least 50 feet from the entrance of the polling place
- Precinct officials may state the number of persons who have voted. No opinions should be given
- Members of the media may take a panoramic photograph or video of the voting place but are not permitted to use a zoom lens that could show the individual voter in the process of voting
- Members of the media should be positioned so that they will not interfere, obstruct, or disrupt the voting process. They are not allowed inside the voting enclosure unless they are there to vote as a registered voter of the precinct.
- Members of the media should be treated with respect
- Election officials are to report problems with media personnel to the board of elections office

Opening the Polls with the iVotronic

1. To begin, locate the Master PEB in your supplies. It should be marked as such. Insert the Master PEB into the first voting terminal.
2. The following terminal screen will appear, "Do not remove PEB, please wait, this process may take a few minutes." You will see this message several times during the opening process.

WARNING: DO NOT REMOVE PEB

Retrieving ballot from PEB
You will be notified when it is safe to remove PEB.

PLEASE WAIT ...

Caution: If the PEB is removed during this operation
The process will need to be restarted.

THIS PROCESS MAY TAKE A FEW MINUTES.

Status Line:
Accessing PEB S/N PS130057- _ (FMW 1.07)

Reading PEB

A progress bar is shown at the bottom right, with a blue segment indicating the current progress of reading the PEB.

You MUST wait for the terminal to completely read the PEB. Notice the progress bar in the right-hand corner of the terminal screen. Be patient – the terminal screen will tell you when to take out the PEB.

3. Once the Master PEB is completely read, the terminal will then display a polling location verification terminal screen. If the polling location is correct, press continue. If not, press no, remove the PEB, and contact your county board of elections immediately.

Verify Polling Location

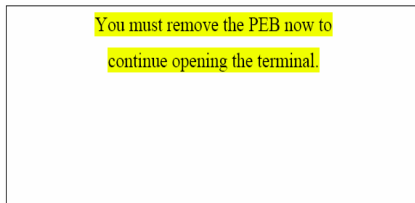
"Polling location name listed here"

Is this the correct polling location?

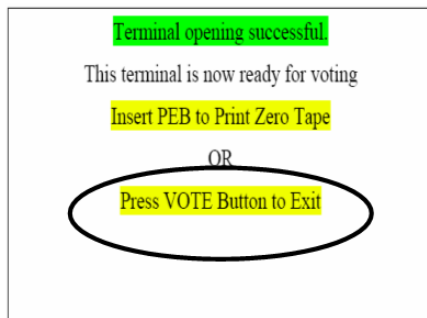
YES No

The screen displays two buttons: a green button labeled 'YES' and a red button labeled 'No'.

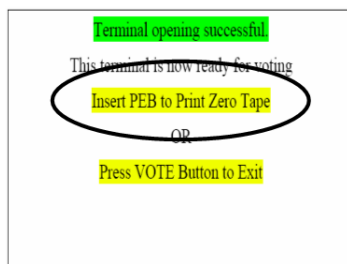
4. After you press "Yes" to verify the polling location, the terminal will display the following message: "Terminal is being opened for voting." Again, DO NOT remove the PEB.
5. When the screen appears with the message "You must remove the PEB now to continue opening the terminal", you may remove the PEB.



6. The terminal will continue opening. Once complete, the message "Terminal opening successful" will appear and instructions to "Insert PEB to print zero tape or press VOTE button to exit" will be displayed.



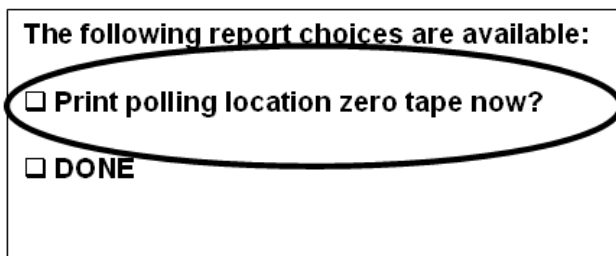
7. If there is only one terminal in your polling location, insert the Master PEB and begin the process for printing a zero tape.
8. Most polling locations will have multiple iVotronics. In this scenario, press the oval VOTE button after opening the terminals on all but the last terminal.
9. Continue opening all terminals in your polling location. *Remember to press the VOTE button for the final step at each terminal.* The data for these terminals is being collected onto the Master PEB in order to create one zero tape for the entire polling location.



10. Once you have reached the last terminal, DO NOT press the VOTE button; instead, insert the Master PEB and begin following the instructions for printing a zero tape.

Printing the Zero Tape

1. Press the selection box next to "Print polling location zero tape now?"

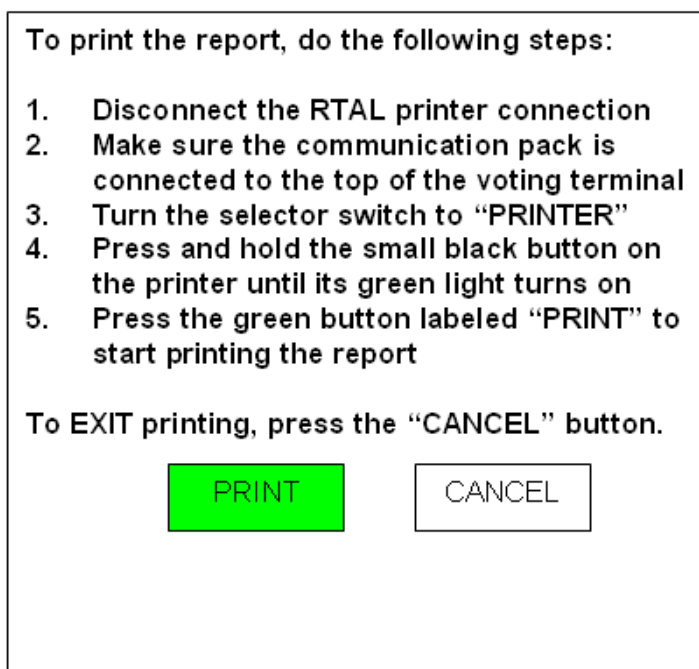


The following report choices are available:

- ☐ Print polling location zero tape now?
- ☐ DONE

A black oval is drawn around the first option, "Print polling location zero tape now?".

2. The terminal will collect the data from the PEB. While this process takes place, follow the instructions on the screen, and DO NOT remove the PEB.
3. Once the terminal has finished reading the PEB, the printing instructions screen will appear. *DO NOT press the Print button, until you have completed the following steps (which are also provided on the terminal screen.)*



To print the report, do the following steps:

1. Disconnect the RTAL printer connection
2. Make sure the communication pack is connected to the top of the voting terminal
3. Turn the selector switch to "PRINTER"
4. Press and hold the small black button on the printer until its green light turns on
5. Press the green button labeled "PRINT" to start printing the report

To EXIT printing, press the "CANCEL" button.

4. First, only unplug the RTAL printer (gray cord) from the top of the terminal
5. Next, depending on your county, you will either attach the black coiled cord from the external communication pack or printer pack to the top of the terminal into the same port/location where the gray RTAL cord had been attached.
 - *A printer pack is a compact printer and requires you to only press the small power button for operation*
 - *A communication pack is a compact printer/modem combo and features a selector switch and power switch to operate as a printer*
6. Once the zero tape prints, the terminal screen will prompt you to disconnect the external printer and reconnect the gray RTAL printer cord
7. With the zero tape still attached to the printer, the chief judge and both judges must sign at the bottom of the tape and place the Master PEB and the zero tape into the proper storage device to be returned on election night. *(NOTE: DO NOT tear the zero tape off of the printer. It should remain attached in order to create one continuous tape once the results tape is printed.)*
8. All terminals are now open for voting
 - *NOTE: If the terminals are not in use for a period of time the screens will go to black. This is a screen saver/energy saver feature.*

Verifying the Public Count with the iVotronic

- County polling location procedures may require you to record the public count at several points throughout Election Day
- To obtain this count from the iVotronic terminal, simply insert the Supervisor PEB into the voting terminal, make no selections, record the count information which appears in the bottom corner of the terminal screen, and remove the PEB to exit the menu.
- This procedure does not activate a ballot or advance the public count

Turning on the Model 100

1. Lift the panels on the left hand side of the scanner to gain access to the locking key and the printer area



2. Insert key and turn it to the OPEN/CLOSE POLL position. It will take approximately two minutes for the scanner to load the election definition from the card into its operating system.

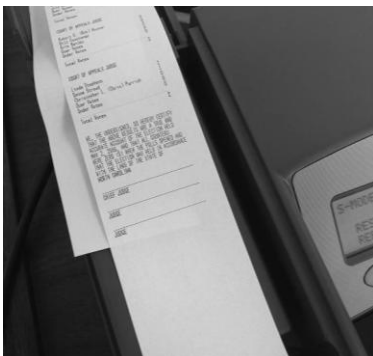


3. The scanner will display "S-Mode" in the upper left corner of the LCD screen and the message "Election Card Inserted Open Polls Now?" Press Yes. The message, "Please Turn Key/Switch to Vote" appears.
4. Turn the scanner key to the VOTE position



Printing the Zero Tape

1. After initializing, the scanner automatically prints at least one zero tape. This report should show no votes on the scanner for each of the races and a certification message.
2. Review the zero tape for accuracy, specifically making sure the tape indicates the correct date, time and polling location. At the end of the tape, the judges should sign the certification lines verifying that there were no votes prior to opening the polls. If any information is incorrect, call your county election office.



3. Roll the tape up and leave it in the scanner



4. With the scanner in the Vote mode, remove the key and secure it in a safe place. Close the access panel.
5. The Model 100 is now ready to accept ballots

Voting Procedures

This section gives an overview of the activities and requirements governing the voting process.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 6, 7 and 10
- Insert county-specific handouts on setting up the voting equipment

At the conclusion of this section, student will have a general understanding of and practical experience on:

- How to ask voters for required information
- How to process different types of voters
- How to solve common problems that occur on Election Day

THREE WAYS TO VOTE IN North Carolina

1. IN PERSON, ON ELECTION DAY

Vote at your assigned polling place. You will be asked to sign the poll book before you vote. The polls open at 6:30 a.m. and close at 7:30 p.m. If you are in the line by 7:30 p.m., you will still be able to vote.

2. IN PERSON, BEFORE ELECTION DAY

For 2 ½ weeks before the election you can vote at a site in your county where you can request and cast a “one-stop absentee ballot.” Every county has at least one site for one-stop absentee voting; some have sites open beyond normal business hours. You do not need an excuse for voting by absentee. To find out where and when one-stop voting is available, contact your county board of elections.

3. BY MAIL-IN ABSENTEE BALLOT

You can request an absentee ballot — no excuse is needed — but the county board of elections must receive the request before the deadline set by law. It must be a written request from you or a near relative, or on a form provided by your county’s board of elections, and must be signed by you or by a near relative (a near relative is a spouse, brother, sister, child, parent, grandparent, grandchild, stepparent, stepchild, or mother-, father-, daughter- or son-in-law.) All absentee requests should be mailed or hand delivered to the appropriate county board of elections office. A voter or qualified near relative may also request an absentee ballot request form by emailing or faxing their county board of elections office. A request for an absentee ballot in the general election should include: Your name, date of birth, residence address, address the absentee ballot should be mailed to, and, if request is made by near relative, the near relative’s contact information and relation to you. The absentee ballot will be mailed directly to the voter. The county board of elections must receive it back by 5 p.m. on the day before the election.

Using ATV forms at the Registration Station

The registration list contains the names of eligible voters in your precinct. The chief judge picks up the list before the election and keeps it secure until Election Day. Authorization to Vote (ATV) forms will be in your supply kit. Completed ATV forms (forms from voters who are issued a ballot) become your “pollbook.”

The registration list includes an ATV label on the right. This label contains the election date, voter’s name, voter registration number, address, age, party affiliation, precinct and ballot style. *Note: The voter’s address will not appear on the ATV label if the voter has filed a government order for address confidentiality with the board of elections.*

Each voter should approach the registration station and state their name and address. If the election is a partisan primary, the voter should also state their party affiliation. During a primary, unaffiliated voters should state their ballot choice (Democratic, Republican, Nonpartisan—they may choose only one). If the voter does not state these, ask the voter to state them. The voter may write their name in lieu of speaking it. Announce the voter’s name and address, and check the voter registration list to verify that the voter is qualified to vote.

If the voter is qualified to vote and their name and address are correct on the registration list:

1. Announce that the voter is registered and eligible to vote
2. Remove the voter’s ATV label from the right column of the voter registration list and affix it to an ATV form
3. If the voter is unaffiliated, and the election is a partisan primary, write the voter’s ballot choice (Rep, Dem, or Non) in section A of the ATV form
4. Have the voter sign in section A of the ATV form
5. Write your initials in section A of the ATV form, give the form to the voter, and direct the voter to the ballot station or next available machine assistant.

If the voter’s name does not appear on the registration list, the election official should ask the voter questions such as:

Could you please spell your name? Are you a Senior or a Junior?

Could you have registered under another name?

Is the name hyphenated? If so, check both names

Are you sure you are in the correct precinct?

If the voter’s name still cannot be located on the registration list, direct the voter to the help station

Voters who voted absentee

If the voter’s name appears on the registration list, but the word “Absentee” appears below their address in the left column and “ABS” appears in the ballot style box on the label, inform the voter that the registration list indicates that the voter has already voted absentee in this election. If the voter has questions, direct the voter to the help station.

Verifying registrant information

If voter's name appears on the registration list, but the words "verify registrant information" appear below the voter's address in the left column, ask the voter if s/he still lives at the address on the registration list.

If the voter still lives at the address on the list:

1. Have the voter complete section B of the ATV form to verify their registration information
2. Write the voter's ballot style on the ATV label and affix the label to an ATV form
3. If the voter is unaffiliated, and the election is a partisan primary, write the voter's ballot choice (Rep, Dem, Non) in section A of the ATV form
4. Have the voter sign in sections A and B of the ATV form
5. Write your initials in section A of the ATV form, give the form to the voter, and direct the voter to the ballot station or next available machine assistant.

If the voter has moved within the past 30 days:

1. Have the voter complete section B of the ATV form to update their registration information
2. Write the voter's ballot style on the ATV label and affix the label to an ATV form
3. If the voter is unaffiliated, and the election is a partisan primary, write the voter's ballot choice (Rep, Dem, Non) in section A of the ATV form
4. Have the voter sign in sections A and B of the ATV form
5. Write your initials in section A of the ATV form, give the form to the voter, and direct the voter to the ballot station or next available machine assistant.

If the voter has moved more than 30 days ago:

1. Have the voter complete section B of the ATV form to update their registration information
2. Affix the voter's ATV label to section A of an ATV form. **DO NOT** let the voter sign section A of the ATV form, and **DO NOT** initial section A of the ATV form.
3. Send the voter to the help station to determine whether the new address is in the same precinct or a different precinct.

Verifying ID

The intent of the ID requirement is to reasonably establish the identity of the voter, not to prove residency.

If voter's name appears on the registration list, but the words "ID Required" appear below the voter's address in the left column, ask the voter to show ID. ID can be:

- a) A current and valid photo ID, or
- b) Documents that show the name and address of the voter: a current utility bill, bank statement, government check, paycheck, or other government document.

If the voter presents ID and is eligible to vote:

1. Write the voter's ballot style on the ATV label and affix the label to an ATV form
2. If the voter is unaffiliated, and the election is a partisan primary, write the voter's ballot choice (Rep, Dem, Non) in section A of the ATV form.
3. Check the type of ID shown next to "ID Shown" in section A of the ATV form
4. Have the voter sign in section A of the ATV form
5. Write your initials in section A of the ATV form, give the form to the voter, and direct the voter to the ballot station or next available machine assistant.

If the voter does not present ID:

1. Direct the voter to the help station

Spoiled Ballots

A spoiled ballot refers to a paper ballot on which the voter made an error. If a voter makes a mistake on their ballot, they may return it to a ballot official and request a new ballot. They are entitled to return up to three spoiled ballots on Election Day. When a spoiled ballot is returned, a ballot official should:

1. Write "spoiled" on the ballot
2. Place the spoiled ballot in the secure container specified by the county board of elections
3. Issue the voter a new ballot. Make sure that the new ballot is the same ballot style as the previous ballot.

Unaffiliated voters voting in a partisan primary

When a voter who is listed as unaffiliated on the registration list seeks to vote in a partisan primary, they may select the primary in which they wish to vote – Democratic, Republican or Nonpartisan. An unaffiliated voter must request a specific party's ballot; otherwise, they are entitled to a nonpartisan ballot. Write the voter's choice (D, R, N) next to the voter's name on the registration list.

In a second primary, an unaffiliated voter may vote only in the primary of the party in which s/he voted in the first primary. If s/he did not vote in the first primary, then they may request a specific party's ballot or a nonpartisan ballot for the second primary. Write the voter's choice (D, R, N) next to the voter's name on the registration list.

Wrong ATV label

If an ATV label is peeled off in error from the registration list and you discover the error before you place it on an ATV form, place the label back where it came from.

If you discover the error after you place the label on an ATV form, place that ATV form at the page of the registration list from which you removed the label. Remove the correct label and place it on another ATV form.

If the label becomes unusable, write the voter registration number and ballot style on another ATV form.

Using ATV forms at the Ballot Station

1. Receive an ATV form from a voter
2. Verify that section A is completed, signed and initialed
3. Check the ballot style box to determine the voter's ballot style
 - a. If the ballot style box is empty, alert the official at the help station or direct the voter to the help station. An empty ballot style box indicates that the voter should provide additional information before voting.
 - b. If "ABS" is printed in the ballot style box, the voter already voted in this election and is not eligible to vote. DO NOT issue a ballot to the voter.
4. Write the next sequential number in the space provided in Section A
5. Issue the voter the ballot that matches their ballot style
6. Place the ATV form in the binder or other holder as instructed by the county board of elections
7. Secure completed ATV forms in sets of _____.
 - a. If your polling place has observers, the observers may inspect the ATV forms during the day to create a list of people who have voted so far that day. At minimum, they may inspect the forms at 10:00 a.m., 2:00 p.m. and 4:00 p.m.
8. Once the polls close, all three judges must sign the last voter's ATV form.
9. Place the ATV forms in a secure container as instructed by the county board of elections.

Curbside voting: ATV and optical scan ballot

Voters who cannot enter the voting place because of age or physical disability may vote curbside anytime that the polls are open. The chief judge should designate an election official to monitor the curbside voting area.

When curbside assistance is needed, the official should take a curbside affidavit to the voter. The affidavit is found in section D of the ATV form. The voter should complete and sign section D. The curbside official should administer the oath to the voter and sign section D.

The official should return to the registration station with the curbside affidavit and give it to a judge to verify the voter's eligibility on the registration list.

If the voter's name and address are on the registration list:

1. The registration official writes the word "curbside" next to the voter's name on the registration list, removes the voter's ATV label and affixes it to the ATV form.
2. The curbside official takes the curbside voter's ATV form to the ballot distribution official to get a ballot for the voter
3. The curbside official takes the ballot to the curbside voter. Give the voter privacy while s/he is voting. After the ballot is marked, have the voter insert the ballot in a privacy envelope.
4. If using an M100 in the polling place, the curbside official returns to the voting enclosure, announces that s/he is placing a curbside ballot in the tabulator, removes the ballot from the privacy sleeve and places it in the scanner. Always keep the voter's ballot secret.
- 4b. If optical scan ballots are to be centrally tabulated, the curbside official returns to the voting enclosure, delivers the ballot sleeve to the chief judge or designated official, who places it in the secure ballot container. Always keep the voter's ballot secret.

If the voter's name and address are not on the registration list:

1. The registration official takes the curbside voter's ATV form to the help station to get a provisional ballot and envelope for the voter.
2. The curbside official takes the provisional ballot and envelope to the curbside voter. Inform the voter that they are not listed on the registration list and give them the opportunity to vote provisionally. If the voter wishes to vote a provisional ballot, instruct the voter to complete the envelope, mark the ballot, insert the ballot in the envelope and seal the envelope. Give the voter privacy while s/he is voting.
3. The curbside official returns to the voting enclosure and places the sealed provisional ballot envelope in the security container provided by the county board of elections.

Curbside voting: Pollbook and M100

Voters who cannot enter the voting place because of age or physical disability may vote curbside anytime that the polls are open. The chief judge should designate an election official to monitor the curbside voting area.

When curbside assistance is needed, the official should take a curbside affidavit to the voter. The voter should complete and sign the affidavit. The curbside official should administer the oath to the voter and sign the affidavit.

The official should return to the registration station with the curbside affidavit and give it to a judge to verify the voter's eligibility on the registration list.

If the voter's name and address are on the registration list:

5. The registration official writes the word "curbside" next to the voter's name on the registration list, writes the voter's name on the pollbook, and issues a ballot access form.
6. The curbside official takes the curbside voter's ballot access form to the ballot station to get a ballot for the voter.
7. The curbside official takes the ballot to the curbside voter. Give the voter privacy while s/he is voting. After the ballot is marked, have the voter insert the ballot in a privacy envelope.
8. The curbside official returns to the voting enclosure, announces that s/he is placing a curbside ballot in the tabulator, removes the ballot from the privacy sleeve and places it in the scanner. Always keep the voter's ballot secret.

If the voter's name and address are not on the registration list:

4. The registration official takes the curbside voter's affidavit to the help station to get a provisional ballot and envelope for the voter.
5. The curbside official takes the provisional ballot and envelope to the curbside voter. Inform the voter that they are not listed on the registration list and give them the opportunity to vote provisionally. If the voter wishes to vote a provisional ballot, instruct the voter to complete the envelope, mark the ballot, insert the ballot in the envelope and seal the envelope. Give the voter privacy while s/he is voting.
6. The curbside official returns to the voting enclosure and places the sealed provisional ballot envelope in the security container provided by the county board of elections.

Deceased voter notices

If a voter asks that the name of a deceased relative be removed from the registration list, follow these procedures:

1. Determine whether or not the voter is a near relative of the deceased. Near relatives are: spouse, parent, child, grandparent, grandchild, brother or sister
2. If the voter is a near relative, remove the deceased voter's ATV label from the registration list and place the label on a Notification of Deceased Voter by Near Relative form, or write the deceased voter's registration information on the form. Circle the voter's relationship to the deceased.
3. Give the form to the near relative to sign
4. Do not write "deceased" on the registration list

Provisional Voting

Any voter may cast a provisional ballot for any reason. Listed below are the categories under which they would cast a provisional ballot:

- A. **Unreported moves voters** (who have moved more than 30 days before the election but failed to report the change of address),
- B. **No record provisional voters** (who claim to have registered but for whom there is no record as registering in the county),
- C. **Previously removed voters** (who were removed as part of list maintenance, but claim continuous residence and the right to vote),
- D. **Jurisdictional dispute voters** (who are registered but whose assignment to a voting district is questioned-- either by the voter or the registration record),
- E. **Incorrect precinct provisional voters** (who appears as registered in another precinct within the county, but states a desire to vote in the incorrect precinct in which the voter appears).
- F. **Special provisional voters** (who appear after the 7:30 p.m. poll closing and vote by virtue of a lawful order)
- G. **Voters that did not produce required identification** (who are on the poll books with a note that they must show ID)

If a voter falls into one of the categories above, the voter will be informed that they may cast a provisional ballot. If she/he elects to cast a provisional ballot the voter will complete a Provisional Ballot Envelope (which includes a Registration/Update Form). The poll worker will record the voter's information on the Provisional Poll Book and record the PIN on the Provisional Ballot Envelope, the Voter Instruction Sheet and the Poll book. Effective January 1, 2007, the poll worker should NOT write the PIN number on the provisional ballot. The ballot and the Provisional Ballot Envelope are provided to the voter. The voter is instructed to

- Mark the ballot
- Place the ballot in the Provisional Ballot Envelope and seal the envelope
- Return the sealed envelope to the Precinct Official who gave him/her the forms

The poll worker will give the Provisional Voter Instructions sheet to the voter and place the sealed Provisional Ballot Envelope into the appropriate storage container. If the ballot is one cast after the poll has closed, the box beside "VOTED AFTER EXTENDED HOURS" in the "FOR OFFICE USE ONLY" area of the Ballot Envelope will be checked. The envelope will be placed in the container marked "EXTENDED HOURS PROVISIONAL BALLOTS."

When provisional ballots are returned to the county board of elections, board of elections employees will enter provisional voter information into the Provisional Voting support in SEIMS including the PIN number given to the voter. The board of elections will attempt to validate (from SEIMS) that the voter is registered by querying all queues. If information is found to indicate that the voter has a valid registration, then the ballot will be stored appropriately and recorded as counted in SEIMS. If information indicating that the voter is not validly registered, then the ballot will be stored in a "do not count" box and the information entered into SEIMS indicating why the ballot was not counted.

The county board of elections will convene to approve/disapprove provisional ballots. After the county board of elections completes its task, the board of elections employee will:

1. Record Board actions that disagreed with the original county board of elections employee recommendations
2. Record the county SEIMS provisional statuses as approved and finalized on the State DB. The database is then locked and the county board of elections cannot make additional changes without special approval from the State Board of Elections. The application will be deployed at the county level, with database replication to a state-wide central database. The state data will be accessible through the web or by calling a toll free number and providing the voter's PIN number.
3. The system will generate entries to record voter history if the ballot was counted, and a voter contact if the ballot was not counted.

The voter will be able to retrieve the information about their vote on the NC State Board of Elections web sit and by calling a toll free number. They will have to give their name and PIN number to retrieve the information in this manner. The information about whether the vote was counted can also be obtained in person at the county or state board of elections offices. In this case the name and PIN number is not required to obtain the information.

Voting on the iVotronic

1. Locate the Supervisor PEB(s) in your supplies. These are the only PEBs used to activate the ballot for each voter. *DO NOT use the Master PEB to activate the ballots at any time. It should be secured until the closing of the polls.*
2. Escort the voter to the voting terminal. Insert the Supervisor PEB.
3. Based upon the voter's registration information, select the appropriate ballot style for the voter by pressing the box next to the appropriate ballot style on the screen. *(NOTE: In a Primary, the ballot style will be based upon party affiliation and possibly jurisdiction. In a General Election, this screen may not be shown if it is not applicable.)*

Ballot Selection Menu

☐ DEM – Ballot Style #1
☐ REP – Ballot Style #1
☐ NON – Ballot Style #1

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Public Count: 0

4. A ballot selection verification screen will be displayed.
 - a. If the ballot style is not correct, press "NO." The terminal will display the Ballot Selection screen again, and allow the poll worker to make a new selection.
 - b. If the ballot style is correct, press "YES" and continue to the next screen.

Ballot Selection

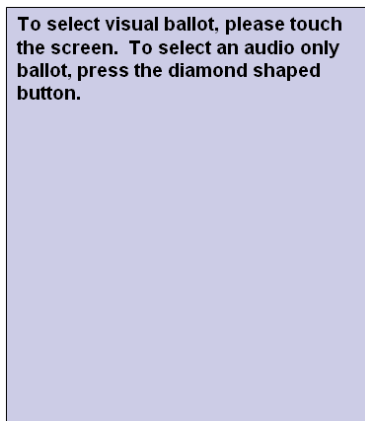
"Ballot Style listed here"

Is this Selection correct?

YES

NO

5. The terminal will prompt the poll worker with the message: "Please remove Supervisor PEB". You should retain the PEB with you at all times.
6. The terminal then displays the screen shown below. Poll workers should touch the screen to activate a visual ballot for a sighted voter.
 - a. If the voter is visually impaired and/or requires ADA assistance, press the green diamond button at the bottom of the terminal and insert the headphones.



7. The ballot instruction screen will appear (Easy As 1, 2, 3.) Instruct the voter to review this page and press "Begin Voting" at the bottom of the screen when they are ready to begin voting. At this point the poll worker should step away from the terminal to provide privacy to the voter.
8. Voters make selections on the iVotronic by touching the box to the left of the name of the candidate until the selection is highlighted. They de-select a candidate by touching the box again. *The iVotronic will not allow a voter to vote for more candidates than may be elected to any one office.*
9. The voter continues through the ballot by pressing the Next button. They may go back to previous ballot contests by pressing the Back button.
10. On the final ballot contest, if a voter is satisfied with their selections, they press the Review button in the lower right-hand corner of the screen.
11. Next the voter will view a summary screen outlining all the selections they have made.
 - a. If the voter is satisfied with their selections, the voter may press the flashing green square on the ballot screen, or the flashing red "VOTE" button at the top of the terminal.
 - b. If a voter chooses to change a selection, the voter should simply press the contest in question, which returns them to that contest screen, and make new selections. The voter must again press the "Review" button on the bottom of the screen and proceed with the instructions on the screen.

12. Once the voter has pressed the red "VOTE" button or the flashing green square, they will be directed to a confirmation screen.



13. A yellow box will appear that allows a voter to either return to the ballot or to cast the ballot. The voter presses the green "Confirm" box on the screen.
14. Once the selection is confirmed, a screen displaying the message "Your ballot has been cast, Thank you for voting" signals that the voter has properly cast their ballot.

Cast or Cancel a Ballot

- If a voter leaves without casting their own ballot, the ballot will have to be cast or cancelled.
- If this scenario occurs, you should notify the chief judge immediately. The chief judge and one judge of the opposite party should perform the following steps (*DO NOT simply cast the ballot from the voter view screen*):
 1. Reinsert the Supervisor PEB
 2. The screen displays, "Last ballot was not cast." Once the judges determine whether to cast or cancel the ballot, press the corresponding selection.
 3. Once a selection is made, the next screen will ask the officials to confirm the previous choice. Select either Yes or No.
 4. If canceling the ballot, select the reason why the ballot is being cancelled from the list.
 5. The screen will then display the cancellation reason, and require you to select whether to proceed with vote cancellation or "Exit the Menu".
 6. Remove the PEB when prompted. Voting can resume on this terminal.
- If the wrong ballot style is selected, the ballot will have to be cancelled. Follow the cancellation steps outlined in the previous bullet points.

Using the ADA Function

- The ADA controls, which include Braille, are most commonly used by voters with visual impairments.
- Headphones should be used to hear ballot instructions and prompts. These are provided with your polling place supplies. Insert them into the headphones jack on the lower right side of the terminal.
- Through audio instructions and prompts, the voter using the ADA function votes using the same screen format as the visual voter; however, no screens are visible on the terminal during the voting process to protect the voter's privacy.
- If an audio ballot is selected in error, simply reinsert the PEB and follow the cancel procedure.

Voting After Scheduled Poll Closing

- When the terminal's internal clock reaches the pre-programmed official poll closing time and a PEB is inserted, the screen will display the "Close Option Menu." If qualified voters are still waiting in line, select the box next to "Exit This Menu" to initialize a ballot for the voter.
- This "Close Option Menu" will come up every time a PEB is inserted past the scheduled poll closing time. Select "Exit This Menu" each time and initialize a ballot for each voter until all qualified voters have been allowed to vote.
- Let the voter cast their vote as usual

Changing the RTAL Paper

Removing the RTAL Paper

1. Using the RTAL printer keys provided in your supplies, unlock the back of the printer case.
2. Once the printer case is unlocked, you will see the gold handle labeled "Pull to Release." Pull this toward you to initially release the printer case, then lower the printer case until it is fully extended.
3. Remove the used paper rolls containing ballots making certain that all printed text is contained on the collection roll. Remove the paper roll by grabbing the spool and pulling downward.

4. If additional blank paper is needed, lift the yellow lever to advance the paper, and then tear in the blank paper area. The printer will automatically spool the collection roll. Once the spool is removed, a seal must be placed around the paper trail, securing the secrecy of the ballots. Place the seal around the end of the paper roll.
5. A precinct official must write the precinct number and terminal serial number on the seal, sign the seal and place the spool in the proper storage container.

Loading the RTAL Paper

1. The first step in loading a new paper roll is removing the roll from the black take-up spool it is delivered on
2. Remove the side of the black take-up spool without the gear on it, by pushing on one side so that the stem is in the larger hole, and then pop it off
3. Once the black take-up spool is separated, remove the paper roll and re-assemble the spool
4. Insert the paper roll into the printer by mounting the roll onto the white spindle. Be sure the paper unrolls from the top
5. Feed the paper into the paper loading slot (two rollers). It may be helpful to fold the end of the paper, giving yourself a distinct straight edge. The paper will catch and auto feed into the paper path.
6. Insert the end of the paper roll through the opening of the black take-up spool, making sure that the gear side of the spool is to the right.
7. Once the paper is inserted, wind the paper around the spool making sure it is securely attached
8. Push the black take-up spool securely in place, so its gear meshes with the drive gear
9. Push the rear paper guide toward the terminal to guarantee that the paper is loaded on the black take-up spool properly
10. Re-insert the printer into the machine case by pushing upwards from the bottom towards the terminal
11. Once the printer case is closed, lock the case and secure the keys in the proper location

Key Points About the RTAL Paper

- Each terminal is equipped with a brand new paper roll when delivered to the precinct. One paper roll can accommodate approximately 100 voters, but varies depending on the number of questions on the ballot and the decisiveness of the voter. The terminal will alert you when it is time to change the paper roll.
- Precinct officials are advised to use each terminal equally throughout the day. This will reduce or eliminate the need to change the RTAL paper.

Troubleshooting the iVotronic

- If at any point the iVotronic is not working properly, notify your county board of elections to make them aware of the situation.

1. "Communication Pack/Printer Pack Failure"

- If the printer fails to print, first verify that you have activated the power switch. If the green light next to the Power label is illuminated, the switch is on and there is power to the printer.
- If this doesn't work, check the cables. Check the communications cable between the terminal and the printer. Verify that you have plugged it firmly into the back of the terminal.
- To ensure proper connection, disconnect and reconnect the cable end.
- Check that the wall socket is working, and check that you have plugged the adapter firmly into the wall socket.
- If a power strip is being used, check that it is turned on

2. "Low Battery Warning"

- The iVotronics contain internal batteries to allow voting to continue if a power failure occurs. When a terminal detects low battery power, which could be 5.5 volts or less, the terminal will beep once and display a message that battery voltage is low. The voter can proceed with the current ballot, but the precinct official should recharge the batteries before the next function.
- If the battery power falls below 5.2 volts, the terminal will issue the following message: "Batteries too low to continue."
- This message occurs at power up and indicates the batteries are too weak to support the terminal screen display.
- When this message appears, remove the PEB. If a voter terminal fails while in use by a voter, the terminal does not record the vote, and you should move the voter to another terminal and begin again.

3. "Internal Malfunction, Terminal is Shutting Down"

- ☐ This message means the vote data in one of the three vote storage memory chips no longer matches the image stored in the other two memory chips. To prevent vote image corruption, the terminal shuts down. Contact your support person as quickly as possible in order to retrieve the votes from the terminal memory. DO NOT attempt further voting on this terminal.

4. Cleaning the terminal screen

- ☐ When cleaning the terminal screen, apply ONLY water or alcohol using a damp paper towel or cloth. Your supply kits may contain alcohol pads.

5. The iVotronic is making a "chirping" sound.

- ☐ Touch the screen to stop the chirping. Instructions on the screen should indicate the next step to take. If not, contact your county board of elections.

6. The point where your finger touches is different from where it appears on the screen.

- ☐ If you or the voter touches a selection but a different selection becomes highlighted then there may be a calibration issue with the terminal. Cancel the ballot and activate another ballot for the voter on a different machine. Do not use this machine until the county board of elections has been notified and a technician has been sent to recalibrate the machine.

7. The screen is blank/dead

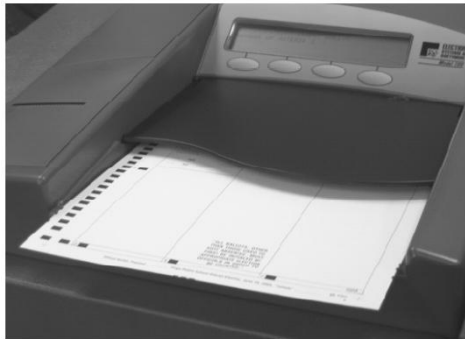
Touch the screen to see if the welcome screen appears. The iVotronic is designed to shut down after a period of inactivity. Inserting the PEB will reactivate the machine and bring up the ballot selection process.

Voting on the Model 100

Have voters use only medium black ball point pens provided in your supplies to fill in the ovals on the ballots.



Have the voter scan their ballot by inserting it into the ballot entry slot in any orientation. The ballot count on the display increases whenever the scanner successfully scans a ballot.



Poll workers should stand back from the scanner to ensure voter privacy, but close enough to detect an audio alert.

The Model 100 will query the voter if they over vote in a contest. The display screen will ask whether to "Accept" or "Reject" the ballot.



Other common errors that prompt alerts are covered later in the Troubleshooting section of this chapter.

Emergency Voting Procedures

If the Model 100 scanner malfunctions during Election Day, contact your county board of elections immediately. Generally, they will instruct you to discontinue use of the scanner and begin using the emergency bin until the problem can be repaired.

The emergency compartment is located on the front of the ballot box below the front scanner access door. Using the ballot box keys, unlock the bin and fold the inner flap backwards.



Close and lock the door to the bin

Instruct voters to place their ballots through the bin's slot



Once the Model 100 is repaired, take the ballots out of the emergency bin, and feed all the uncounted ballots through the scanner at the end of the evening after the polls close.

Troubleshooting

In this section we will review solutions to the most common Model 100 error messages.

If at any point the Model 100 scanner is not working properly, first notify your county board of elections. They will instruct you if it is necessary to use the emergency voting procedures.

Ballot Feed Error Messages

During Election Day voters may encounter error or alert messages when processing their ballot. The following situations represent some common ballot exceptions that the voter may experience, and the poll worker may be called upon to provide assistance.

Error Messages

1. Printer Failure: If there is a printer failure, check to make sure the lever is down inside the printer compartment.
2. Diverter/Code Channel Error: If the message "Diverter Not Found" or "Code Channel" appears, push the scanner unit firmly against the back of the ballot box. The diverter connector must lock into the back of the Model 100. Also make sure the top metal panel on the ballot box is open. If the panel is closed, unlock the front panel, slide the Model 100 forward, open the panel then slide the Model 100 back into place, close and lock the front panel and then reinsert the ballot.
3. Under-votes, Blank Ballots, Overvotes: Under votes and blank ballots are accepted by the Model 100 without a prompt to the voter. However, overvoted ballots are partially returned with a message that asks the voter to tell the machine to accept the ballot as marked or to return it to the voter, so that it may be spoiled by the poll worker and the voter may receive another ballot.
4. Extraneous Marks: If a ballot is unable to be processed due to damage, extraneous marks or doodling by the voter, or by a hardware problem, an audio alert will sound and the ballot will automatically be returned to the voter. The ballot will not be counted and no votes will be cast. If the problem is a ballot issue, the ballot may be spoiled, and a new one issued to the voter. If the display indicates a system message, it may be necessary to contact your county board of elections office to assist in the interpretation of the message and correction of the issue.
5. Missed Timing/Orientation Marks: If the message "Missed Timing Marks" or "Missed Orientation Marks" appears when a voted ballot is inserted and then the ballot is returned, have the voter turn the ballot over and reinsert it into the Model 100 in a different orientation. If the error message appears again, ask the voter to spoil the ballot and receive a new one.

Voting with the AutoMARK™

The AutoMARK™ is a marking device and does not tally or calculate votes. For this reason, once a voter marks their ballot using the AutoMARK™, the ballot must be scanned by the Model 100 counter in order to record the vote.

A voter may mark their ballot using the AutoMARK™ in one of three ways:

1. The Sip-N-Puff ADA personal device
2. Using the keypad which includes Braille
3. Directly on the touch screen

Voting by Sip-N-Puff Method

The ADA device Sip-N-Puff can be utilized with the AutoMARK™ through a port located on the front of the terminal

The voter supplies this device

The voter operates the Sip-N-Puff by using their mouth on a straw to send inputs to the AutoMARK™. The voter puffs or sips on the straw to indicate a “yes” or “no.”

Using the Keypad Method

The keypad method, which includes Braille, is most commonly used by voters with visual impairments.

Headphones should be used to hear ballot instructions and prompts. These are provided with polling place supplies.

Voting Procedures

1. Using a ballot from the current election, the voter will insert an unmarked ballot into the ballot feed tray. The screen will indicate the ballot is being scanned. If applicable, a language screen will appear, and the voter selects the appropriate language to be displayed on the AutoMARK™.
2. When the Voting Instructions display appears, press Next to move to the first contest.
3. The voter can make selections by either pressing the candidate name or the oval next to their name. If the voter selects another choice on a “vote for one” contest, it will clear the first selection. In a multi-choice contest (i.e., “vote for two”), if the voter has already selected as many candidates as allowed, they must first deselect a choice before selecting a new one.
4. Press Next to move to the next screen.

Under-Vote

In North Carolina, a voter may choose not to vote for any candidate(s) in a contest. When this occurs the AutoMARK™ displays an alert screen. The voter can select "Return to This Contest" and select a candidate(s) or touch "Continue to Next Contest" and leave the vote as an under-vote.

Overvote

The AutoMARK™ also displays an alert screen if the voter attempts to overvote in a multi-choice contest. If the voter wishes to change their selection they must deselect a previous choice, and then select an alternate choice for the contest.

Casting a Write-In Vote

1. On the contest screen, select Write-In.
2. Next a Write-in screen appears and the voter touches the letters to spell the write-in selection. *(For the keypad voting method, the voter uses the Up and Down Arrows to hear each letter read. Once the desired letter is announced, press select.)*
3. When done, the voter presses the OK button and the write-in name will be displayed (or announced). *NOTE: Press the Cancel button or the Left Arrow on the keypad to close the write-in screen without entering a candidate and return to the contest screen.*
4. When all ballot contests have been displayed, the summary screen appears. By pressing the contest name, the voter may go back to any contest and make a change.
5. A bar displaying "More" appears on the screen when the summary continues beyond the available screen space. Pressing this bar allows the voter to continue their review.
6. When the voter is satisfied with all of their selections, the voter presses Next to continue.
7. Next the voter presses the Mark Ballot button. The ballot will be marked and returned to the voter.
8. The voter then removes the ballot and submits it to the Model 100 for tabulation.

Additional Features of the AutoMARK

Zoom In/Out: The AutoMARK™ includes a zoom feature for voters who prefer to view the ballot in a larger text. By pressing Zoom In/Out the text is enlarged, pressing the button again returns the text to the default size.

High Contrast: Pressing this button changes the default colors on the screen to black and white. When a voter selects High Contrast, the background becomes black and text becomes white. Pressing High Contrast again returns to the default colors.

Verifying the Ballot: To verify the ballot, the AutoMARK™ allows the voter to insert their marked ballot into the ballot feed tray to verify a vote. No changes can be made from this verification step and the voter will only be able to view and hear the summary screen. If the voter wants to make changes, they must return the ballot to the precinct worker to be spoiled. A new ballot is then issued and the voting process must be completed again.

Troubleshooting

If at any point the AutoMARK™ is not working properly, notify your county board office to make them aware of the situation and the opportunity to provide additional instruction.

The AutoMARK™ does not start up:

- Make sure the power cord is plugged in
- Check for green power bars on back of the unit
- Make sure the key switch is turned to the "On" position
- Turn the key switch to the "Off" position, unplug the unit, plug it back in, and turn the key to the "On" position.

If any of the following messages appear, turn the key to the "Off" position, unplug the unit, plug it back in, and turn the key to the "On" position:

- "Cannot initialize scan heads"
- "Ink cartridge is missing"
- "Data error"

For ink cartridge errors, after turning off the unit, confirm that the ink cartridge was installed correctly and that the tab was removed from the ink head before installing the ink cartridge. Remove ink cartridge and reinsert.

If the AutoMARK™ freezes or the ballot gets jammed while the voter is in the process of voting:

1. Press the "Exit" button on the touch screen to eject the ballot
2. Turn the key to test and press "Eject Ballot."
3. If the ballot does not eject, remove the tray under the back panel by pressing in on the tabs and lifting up. If the ballot is visible under the tray, pull the ballot out and replace the tray. If the ballot is not visible from the front, check the back panel by pushing the tab next to the power cord. If the ballot is not visible in either location, contact the county board of elections immediately.

If the message "Ballot has not been recognized" appears on the screen when the voter inserts a ballot, instruct the voter to turn the ballot over and reinsert it into the AutoMARK™. If the error appears again, spoil the ballot and provide the voter with a new ballot. If the error message appears with the second ballot after the first ballot is spoiled, call the county board of elections immediately.

Challenging the Right to Vote

To make a challenge on Election Day, a challenger must be a registered voter of the same precinct as the person being challenged. A challenge may be made when the registrant presents himself to vote anytime that the polls are open. Contact the CBE if a voter is challenged.

Challenge Checklist

1. Is the challenger a registered voter of the precinct? If no, the challenger does not have standing to make a challenge.
2. If the challenger has standing to make the challenge, the challenger will fill out the Notice of Challenge Form, located on the front of the Challenge Envelope. After making the challenge, the challenger must leave the voting enclosure.
3. The chief judge signs and dates the Notice of Challenge Form.
4. A judge writes "challenged" beside the voter's name on the registration list.
5. The chief judge and judges will hold a hearing as soon as possible, before the polls close. The judges decide, by majority vote, whether the challenged person is a qualified voter.

Hearing Process

1. Begin the hearing by explaining the qualifications for registering and voting to the challenged voter.
2. Question the challenged voter regarding qualifications.
3. Witnesses other than the challenged voter may be heard once placed under oath by the chief judge.
4. The chief judge administers the Sworn Voter Oath to the challenged voter.
 - a. If the judges find that the person is a legal voter and the challenged voter takes the oath, the challenge should be overruled and the person permitted to vote.
 1. The judges write the word "sworn" next to the challenged voter's name on the registration list and ATV Form or poll book.
 2. The voter is permitted to vote
 - b. If the challenged voter refuses to take the oath, the challenge should be sustained.
 1. The judges mark the registration list next to the voter's name to indicate a sustained challenge.
 2. The judges erase the voter's name from the poll book, if it had been written in, or write "challenge sustained" across the voter's ATV label.
 3. The voter may vote a challenged ballot once they complete the Application for Challenged Ballot and affidavit on the back of the Challenge Envelope.
 4. The judges write the voter's name and the next sequential challenged ballot number on the Log of Challenged Voters. Judges also write the challenged ballot number on the ballot, challenge envelope, registration list and poll book or ATV label (i.e. C1, C2).
 5. The challenged voter shall mark the ballot privately, but in the presence of the chief judge, seal the challenged ballot in the Challenge Envelope, and deliver the sealed envelope to the chief judge.
 6. The chief judge shall store all sealed Challenge Envelopes in a security container, which s/he shall seal immediately after the polls close.
 7. At the end of election night, all three judges should sign the Log of Challenged Voters.

Voter Assistance

Any voter, whether disabled or not, may request assistance from a near relative in casting a ballot. Assistance may be rendered for the voter going to and from the voting booth and inside the voting booth. Assistance may also be rendered to persons voting by curbside or one-stop absentee ballot.

Who is entitled to voter assistance?

All voters who request assistance and qualify as stated above.

Who may assist a voter?

If the voter is blind, disabled or illiterate, the voter may ask almost anyone for assistance.

All voters may request assistance from near relatives. Other relatives may assist the voter ONLY IF the voter is blind, disabled or illiterate. Near relatives are:

- spouse
- child (including stepchildren and sons- and daughters-in-law)
- parent (including mother- and father-in-law)
- grandparents
- grandchildren

Precinct officials may assist any voter if not specifically prohibited by law from doing so.

Who may NOT assist voters?

Voters' employer

Agent of the voter's employer

Officer or agent of the voter's union

How does a voter get assistance?

A voter must request assistance, and choose the person from whom they would like assistance. Precinct officials must not suggest that a voter needs assistance.

Responsibilities of persons rendering assistance

Do not try to convince a voter to cast a ballot in any particular way

Voter assistance is given in private, and information about how the voter cast the ballot must not be noted, recorded or shared with anyone.

Remain outside of the voting enclosure when not rendering assistance

Closing the Polling Place

This section gives an overview of the activities and requirements necessary for closing the polling place. Topics include, but are not limited to required announcements, poll book signing, results tabulation results, ballot storage, report creation, supply packing and machine disassembly.

Materials

- The Precinct Manual by Robert P. Joyce, Chapters 6, 8 and 9
- Handout – Closing the Polling Place
- Handout -- Closing the polls on the voting equipment

At the conclusion of this section, students will have a general understanding of and practical experience on:

- How to announce the closing of the polling place
- How to close the polling equipment
- How to secure ballots and voting equipment
- How to complete the required paperwork

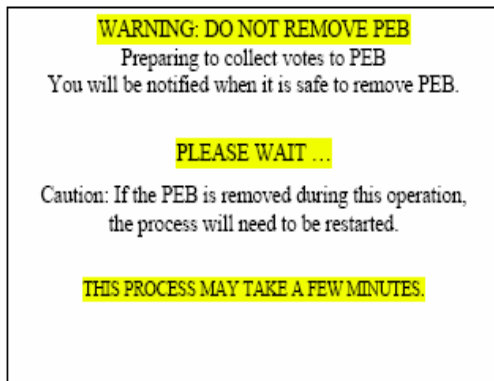
Closing the polls

1. At 7:30 p.m. a designated judge announces that the polls are closed
2. If anyone is in line to vote at 7:30 p.m., one election official proceeds to the back of the line and begins writing the names of everyone in line. The official gives the list to the registration official. An official monitors the line to make sure that no one gets in line after 7:30 p.m.
3. Once all eligible voters have voted, all three judges sign the last voter's ATV form or under the last voter name in the poll book.
4. Observers may be present in a designated area to observe the counting process.

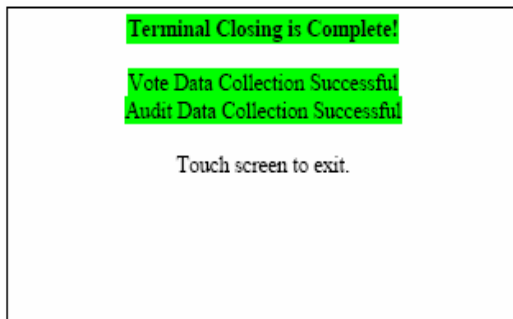
Closing the Polls on the iVotronic

When poll closing time is reached and all voters have voted, return the Supervisor PEBs to storage and follow these steps to close each terminal.

1. Remove the Master PEB from the secured location and insert the Master PEB into the first voter terminal.
2. When the terminal displays the "Close Option Menu", select "Close the Polls". The terminal will display the Warning screen – DO NOT remove the PEB. The terminal will display a progress screen as it begins the closing process.



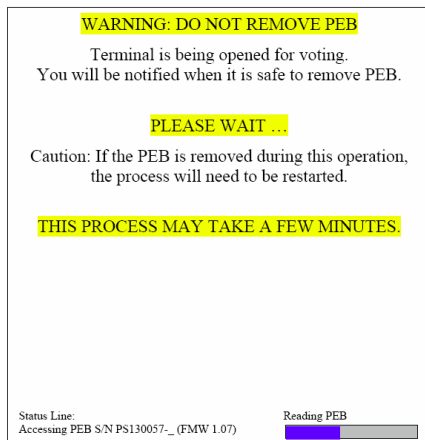
3. Once the terminal has gathered the vote data to the Master PEB, it will instruct you to remove the PEB. Remove the Master PEB. The terminal will continue to close. The completion screen will appear. Touch the screen to power down the terminal.



4. You may now continue to the next terminal and repeat the process

Printing the Results Tape

1. After closing all the terminals, reinsert the Master PEB into any one of the terminals to print the results tape. *NOTE: If you have more than one terminal and have not closed all the terminals, a message will appear specifying the opened terminal(s). Take the Master PEB and find that terminal(s) and follow steps for "Closing the polls" in your county poll worker manual.*
2. The screen will ask you to choose the report that you would like to print. Select "Print polling location results tape now?" The following terminal screen will appear, "Do not remove PEB, please wait, this process may take a few minutes." You **MUST** wait for the terminal to completely read the PEB. Notice the progress bar in the right hand corner of the terminal screen. Be patient – the terminal screen will tell you when to take out the PEB.



3. Once the terminal has finished reading the PEB, the print instructions screen will be displayed. **DO NOT** press the Print button until you have completed the following steps (which are provided on the terminal screen also.)
 - a. First, **only** unplug the RTAL printer (gray cord) from the top of the terminal.
 - b. Next, attach the black coiled cord from the external communication pack or printer pack to the top of the terminal, where the gray cord was plugged in.
 - c. Plug the printer into a power source
 - d. Next, turn the selector switch on the external printer to "Printer" (not required for the printer pack)
 - e. Press and hold the small black button on either printer style until its green light turns on

4. Once the above steps have been completed press the green "Print" button on the screen.

To print the report, do the following steps:

1. Disconnect the RTAL printer connection
2. Make sure the communication pack is connected to the top of the voting terminal
3. Turn the selector switch to "PRINTER"
4. Press and hold the small black button on the printer until its green light turns on
5. Press the green button labeled "PRINT" to start printing the report

To EXIT printing, press the "CANCEL" button.

PRINT

CANCEL

5. After a few seconds, the external printer will begin printing multiple copies of the results tape for your precinct. Once the results tapes have been printed, the terminal screen will prompt you to disconnect the external printer and reconnect the gray RTAL printer cord.
6. The chief judge and both judges must sign at the bottom of the tapes.
7. Place one tape in the security bag to be returned on election night with the supplies and follow your county's procedure for the additional tape.
8. The terminal will then display: "Do you want to print another report?" Select No, which returns to the terminal display "The following report choices are available"
9. Select Done
10. The next screen will display: "Do you want to recollect this terminal?" Press No, and the screen will indicate, "Please remove PEB. Re-collection not chosen"

"Do you want to re-collect this terminal?"

☐ Yes

☐ No

Removing the Flash Card and Paper Rolls

The next step is to remove the flash card from each terminal. The flash card is another source of vote storage from the terminal.



1. Cut the seal of the flash card door (located beside the RTAL cable connection) and remove the flashcard by sliding the privacy door to the side and pull directly up. *DO NOT use pliers or similar tools to remove – this may damage or crush the flash card.*



2. Once you have removed all the flash cards and you are sure you have the same number of flash cards as you have machines, place them in your security bag for return to the election office that night. *NOTE: Your county may provide individually-labeled envelopes for each flash card; follow county procedures, if applicable.*
3. Next, proceed with removing the paper rolls from each machine. The paper rolls contain actual ballots cast and must be secured and accounted for.
4. Using the RTAL printer keys provided in your supplies, unlock the back of the printer case.

5. Once the printer case is unlocked, you will see the gold handle labeled "Pull to Release". Pull this toward you to initially release the printer case, and then lower the printer case until it is fully extended.



6. Remove the used paper rolls containing ballots, making certain that all printed text is contained on the collection roll. Remove the paper roll by grabbing the spool and pulling downward. If additional blank paper is needed, lift the yellow lever to advance the paper, and then tear in the blank paper area. The printer will automatically spool the collection roll.
7. Once the spool is removed, a seal must be placed around the paper trail, securing the secrecy of the ballots. Place the seal around the end of the paper roll.
8. A precinct official must write the precinct number and terminal serial number on the seal, sign the seal and place the spool in the proper storage container.



Closing the Polls on the Model 100

1. At the close of polls, first open all ballot compartments, including the emergency bin, and remove the counted ballots. Place them in your county's security ballot box for transport to your county board of elections office.



2. Open the key access panel. (Some counties have the capability to modem results. If your county's elections office has indicated that you have this capability, then at this time you will connect the telephone cord to the modem jack that lies beneath the right hand scanner door.)
3. Insert the scanner key, and turn it to the Open/Close Poll position.



4. Press Close Polls on the LCD panel to officially close the polls. The scanner will automatically print a results tape report and a certification report.
5. All the judges must sign the end of all the tapes printed. Secure the tapes with the ballots to return to the county board of elections.

Transmitting Your Results Via Modem

(Not applicable to all counties)

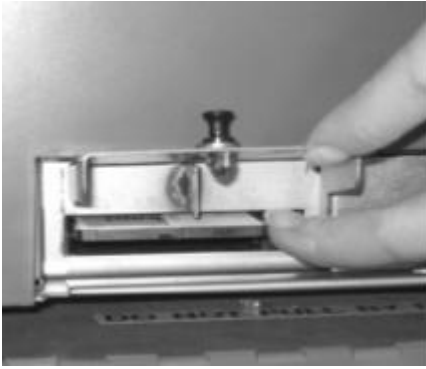
1. After printing results tapes, if the election is coded to transmit results via modem, it will either begin to dial and transmit automatically, or prompt the poll worker with the message "Transmit Results Now?" Press "Yes"
2. The Polls Closed menu will appear after printing and/or transmitting results is complete. If you manually transmit your results, press Send Results from the poll closed menu. The scanner automatically dials the phone number programmed into the scanner's modem and transmits the election results. *If it fails, try again several times. Call your county board of elections office if it fails to go through.*

Disassembling the Model 100

1. Once the results have printed, turn the scanner key to the OFF position, remove the key and store it in your supplies.



2. Unlock and open the front scanner access panel to access the PCMCIA card. If the door is sealed, cut the seal and open the door.
3. Remove the PCMCIA card by pushing the eject button located to the right of the card. Secure the PCMCIA card as instructed by your county elections office for return on Election Night.



4. Ensure the key access and printer access panels are closed
5. Unplug the scanner from the outlet
6. Pull the cord out of the ballot box and set it inside the scanner's carrying case. Slide the scanner forward until it is free of the ballot box's mounting rails. Place the scanner inside its carrying case.
7. Again, make sure there are no ballots in the ballot box. Lock and secure all ballot box doors.

Closing the Polls and Disassembling the AutoMARK™

1. Once the polls are closed, insert the brass key into the mode switch and turn to the Off position. Remove the key and secure it as instructed by the county board of elections.



2. If required by your county, open the rear access door and remove the ink cartridge. Place the used ink cartridge inside the carrying/storage case.



3. Unplug the headphones
4. Lift up the ballot feed tray and fold it inward for storage

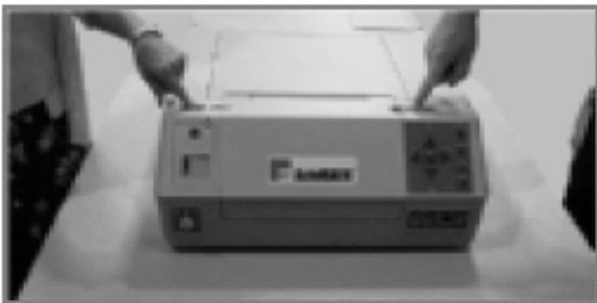
5. Open the lid and fold the touch screen monitor back into the recessed area



6. Lower the lid over the touch screen monitor



7. Lower the lid flap over the ballot feed tray
8. Move the lid latches inward to secure the lid



9. Unplug the power cord from the wall outlet. Remove the power cord from the AutoMARK™.
10. With the assistance of another poll worker, place the AutoMARK™, power cord and the headphones into the carrying/storage case. Close the case and turn the latches clockwise. Keys should be stored as instructed by the county board of elections.
11. Place the AutoMARK™ in a secure location for pick up

Canvass and Recounts

This section gives an overview of the laws and regulations for canvassing and recounts.

Materials

- The Precinct Manual by Robert P. Joyce, Chapter 9
- Handout – Canvass Procedures
- Handout – Recount Procedures

At the conclusion of this section, student will have a general understanding of and practical experience on:

- How to tabulate the results using the equipment
- How to send results to the county elections office
- The process for canvassing
- The process for recounts.

CANVASS

Canvass:	The entire process of determining that the votes have been counted and tabulated correctly, culminating in the authentication of the official election results. <i>G.S. 163-182.5(a)</i>
Election results:	Unofficial v. Official <i>G.S. 163-182.2; 8 NCAC 10B.0105 (g) & (h)</i> County – precinct totals for all candidates and ballot items <i>G.S. 163-182.5(b)</i> State – county totals for all candidates and ballot items <i>G.S. 163-182.5(c)</i>
Reconciliation:	Pollbooks, registration lists, votes cast Ballots issued, voted, spoiled, and returned Absentee ballots, requests, applications, executed absentee ballot list Provisional ballots – issued, approved, disapproved Voting system tapes
County Board Canvass meeting:	Tenth day following the general election in November of each even-numbered year, seventh day following all other elections <i>G.S. 163-182.5(b)</i>
Abstracts:	Prepared in triplicate when canvass is completed (county board, county clerk of superior court, SBE) <i>G.S. 163-182.6</i>
Certificate of Nomination or Election:	Issued by county boards six days after completion of canvass UNLESS there is an election protest pending <i>G.S. 163-182.15(a)</i>
Commissions:	Issued by governor for U.S. House of Representatives, justices, judges and district attorneys <i>G.S. 163-182.16</i>
Summary:	<i>G.S. 163-182.17</i>

Recount Procedures

Every election should be prepared assuming there will be a recount. Public perception is vital in conducting a recount. Providing information and forms in an organized manner strengthens the perception of the overall integrity of the process. Every county should prepare a recount packet to be used in the event of a recount. The packet should include:

- Printed copy of all statutes and administrative codes pertaining to recounts
 - 163-111(d) Tie Votes; How Determined
 - 163-182.7 Ordering Recounts
 - 163-182.7A Additional provisions for hand-to-eye recounts
 - 163-182.8 Determining result in case of a tie
 - 08 NCAC 09-Conduct of Vote Recounts by County Boards of Elections
- Forms to request a recount
- SBOE Notification Form
- Recount Contact Information Form to list candidates, parties, media, board members, and anyone that should be informed of the recount
- Supply list of all things needed to conduct a recount
- SBOE recount procedures
- Copy of the recount procedures signed and adopted by the local Board. This would include how each ballot type is to be counted (Absentee-by-Mail and One-Stop, Precinct, Provisional, Curbside, etc.)
- Worksheet to track precincts as recounted
- Tally sheets for hand/eye counts

Have all information organized to insure that all information given to individuals is provided in a consistent format. This will save time and allow the focus of a recount to be on election specific details.

To assure you are prepared for any recount, follow all setup and security procedures from pre-election until post-election. All audit information, programming records, equipment testing records and test reports generated must be kept secure at all times.

Once you have been notified of a recount, document the date specified by the State Board of Elections, or establish and document the date selected by the county board. Determine time, place and staff needed to perform the recount. Notify everyone on your contact information form of where, when, why and how the recount will take place. In accordance with open meeting laws, post public notice on courthouse door and give public notice to media sources. Notification is critical to the public perception of recount proceedings. Notification should extend well beyond those required by statute. Including all interested parties will demonstrate the openness of the procedures. There is also value in being able to state that these parties were requested to be present at the recount in the event that persons are unhappy with the outcome.

Make sure board members, staff and all election officials used with the recount are fully aware of the rules and processes involved. At the recount, keep a log of everyone in attendance. Keep all ballots, memory packs, tapes, etc. secure until everyone is present and you are ready to begin the recount process. Before starting, briefly explain to candidates and observers the process you will be going through.

Establish rules of operation to assure ballots will be controlled, free from tampering and to assure ballots are not mixed with ballots not assigned to the precinct or jurisdiction being counted.

Direct Record Equipment

- The election official will demonstrate how the audit data was retrieved from all equipment prior to the canvass
- The election official will show all observers the directory displaying the serial numbers for all equipment used in the election
- The election official will use the vendor software to retabulate the results from this audit data and print out two result reports
- Two groups made up of one election official from each party will compare these results to the original election results by the process of one person calling out the numbers to the other who will verify that it is the same.
- If any differences are found between the original totals and the recounted totals then the county board will follow the guidelines in NCAC 09.0108

Optical Scan Equipment

- For recounts, use either:
 - a duplicate PCMCIA card that does not contain results from the original election (which was tested as part of your original L & A testing prior to the election); or
 - reuse the original card after backing up the original data in ERM, printing a backup tape of the original results, then clearing the card for use in the recount.
- The election official will insert the card into the tabulators
- The election official will plug the tabulator in and receive a zero printout
- The election officials will sign their names on the zero printout, announce the name of the precincts to be counted and write the name of the precinct to be counted on the tape
- The election official will be given the ballot box containing the voted ballots and the security envelope containing the voted write-in bin ballots for the precinct that they are counting
- All initially voted and voted write-in bin ballots for the precinct will be fed into the tabulator
- Then the election officials will run the ballots for that particular precinct through the tabulator
- Following the insertion of the last ballot for that precinct, print out the vote totals
- After this procedure is concluded, unlock the ballot box door to view the out-stacked section to see if there are any ballots that the tabulator could not count.
- If there are ballots to be hand counted, these ballots will be hand counted by the election officials and added to the tape results next to the appropriate candidate's name.
- Election officials will then sign the results printout and complete and sign a return sheet
- Replace all the voted ballots in the security containers in which they were stored
- Open the ballot boxes for inspection to assure no ballots remain inside
- Seal the ballot box, label it with the precinct name, and have the election officials sign the seal.
- A staff member will then zero out the memory pack and the process will start again for the next precinct to be counted.
- This process will continue until all precincts are counted
- The Board of Elections will conduct the official canvass of the recount immediately following the counting of the last precinct and recording of the vote totals, certifying the recount results.
- These vote totals will then be submitted to the State Board of Elections

RECOUNT PROCEDURES CHECKLIST

ORGANIZE FORMS AND INSTRUCTIONS

- ☐ Prepare Recount package
 - ☐ Copy of all statutes and administrative code pertaining to recounts
 - ☐ Recount request forms
 - ☐ SBOE instructions on recounts
 - ☐ CBE local instructions for recounts
 - ☐ Contact information sheet
 - ☐ Worksheet to track precincts as recounted
 - ☐ Tally sheets for hand/eye counts
 - ☐ Supply list
 - ☐ Any other information that would be helpful

RECOUNT EVENTS-NOTIFICATION CHECKLIST

- ☐ Schedule Recount and establish complete calendar of events
- ☐ Prepare and publish legal notice. Follow Open Meetings Law guidelines while providing maximum flexibility to accommodate unknown time requirements.
- ☐ Schedule training/information session for staff
 - ☐ Establish firm guidelines for release of ALL information to media and within staff
 - ☐ Clearly list individual staff and department duties
 - ☐ Cover calendar of events thoroughly
- ☐ Reserve facilities if necessary
- ☐ Notify
 - ☐ Recount requestor
 - ☐ Recount designees
 - ☐ CBE
 - ☐ Legal counsel
 - ☐ Administration staff
 - ☐ Media-all outlets
 - ☐ Apparent winner
 - ☐ County party chairmen
 - ☐ Other interested parties
 - ☐ Security if needed
 - ☐ Require name badges for all authorized personnel
 - ☐ Orally review with all present:
 - ☐ Rules of recount board, observers and staff
 - ☐ Processes performed to date
 - ☐ Procedures for recount
- ☐ Open sealed containers ONLY when CBE and observers are present
- ☐ Keep all ballot access in full view
- ☐ Follow specific rules for recounting your type of equipment as spelled out in state statutes, SBE and CBE instructions

OBSERVERS AND MEDIA

- ☐ Know and enforce any limitation on the number of observers
- ☐ Check observers/media in and out. Keep a log.
- ☐ Provide easily identifiable name badges and require their use
- ☐ Provide observer/media packet that includes:
 - ☐ Schedule of events and Code of Conduct
 - ☐ Copy of original results
 - ☐ Recount accounting worksheet
 - ☐ Contact information
 - ☐ Statutes, SBE and CBE recount instructions

RECOUNT RESULTS

- ☐ Determine how results will be released – as count progresses or at completion
- ☐ Determine how many original copies of recount results are needed
- ☐ Notify interested parties of the outcome of the recount findings

MISCELLANEOUS

- ☐ Plan for lunch or refreshments needed so that Board and staff may remain on site
- ☐ Building needs
 - ☐ Security
 - ☐ Parking
 - ☐ After hours environmental such as cooling/heating on timer, access to restrooms, etc.
- ☐ List of additional administrative staff to bring in if necessary

List of Attachments

Attachment A	Guide to Precinct Management
Attachment B	NC General Election Laws Index